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A REPORT OF THE SKIER POTENTIAL FROM THE ALBERTA NON-SKIER MARKET

Presented to: Canada West Ski Areas Association and Alberta Tourism

Presented by: Marktrend Marketing Research Inc.

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THE SKIER POTENTIAL FROM THE ALBERTA NON-SKIER MARKET

EXECUTIVE SUMMARY OF RESULTS AND CONCLUSIONS

1. Market Potential

Projecting the results of the quantitative survey to the total Alberta population indicates the following:

* Non-skiers who stated they will very likely ski next year represent 5% of the total population, or 48,000 people.

* Non-skiers who said they will quite likely ski next year represent 3% of the population, or 34,800 people.

* The total of 82,800 potential skiers expect to ski approximately 11 times per season.

* If this level were achieved the range of skier days would be between

  528,000 and 910,800.

  Assuming an average lift pass cost $20 per day (for local mountain ski areas) this could translate into a maximum incremental revenue range of between

  $10,560,000 to $18,200,000

  from Alberta's non-skier market.

The above projections must be considered in the context that future expected behaviour is extremely difficult to predict.

Even if the provincial average of three ski days per person per ski season is used, the above indicates an incremental revenue range of between

$2,880,000 and $4,960,000.

2. The Potent Market Segments

Two specific sub-segments of non-skiers have been identified for having the greatest potential for conversion to skiing. These have been given the following titles and are characterized by specific demographics and ski imagery characteristics.

Social Adventurers

Demographics

- 18 - 44 years old
- lower education and income
- blue collar occupation
- both males and females
- have skied
- less than 1/3 have skied previously

Ski Imagery

- quite fearful of skiing but want the risk and thrill
- want fun, excitement, romance and socializing

Young Family

Demographics

- 18 - 44 but more likely younger
- medium education
- white collar/blue collar and homemaker
- married
- both males and females
- 2/3 have skied previously

Ski Imagery

- Confident of skiing ability.
- Will return to skiing once children allow, and can afford to.
- Want healthy, relaxing, exhilarating family orientation.

Four other lifestyle groups were identified. However they are unlikely to be convinced to take up skiing. The "Rural Sedentary" and "Fearful Elders" are disinterested and have never been attracted to the sport.

The "Upwardly Mobile" have tried skiing, and rejected it for other pursuits, sporting and otherwise. The "Disinterested" have skied considerably but the attraction has gone completely, not being replaced by any other interests.

3. Ski Positioning

To attract the non-skier population, skiing needs to be repositioned to invite those who have never skied, to beginner and lapsed skiers. A generic campaign that will establish skiing as the following is required:

- FUN;
- a shared experience;
- a healthy exhilarating activity;
- accessible to all;
- rewarding and challenging;
- family and singles oriented;
- non-threatening when good technique is used;
- worth every cent of the cost.

4. The Role of the Local and Mountain Ski Areas

The non-skier's perception of skiing is dominated by images of the mountain ski experience which has both positive and negative influences. Downhill skiing is perceived to take place in a major ski area, whereas the smaller local hills do not fit into their frame of reference.

To invite and attract non-skiers, activity in the local area should assume some responsibility for generating interest and preparing skiers for the larger more challenging mountain facilities.

5. Major Barriers to Skiing

The expected reasons for not skiing, cost and fear of injury, were found in the study. These have, however, been re-examined, their components identified and remedial actions suggested. Although the monetary aspects tend to dominate, commitments of time for pre-ski training and transportation, organization and staging, transportation and ski trip management are just as influential.

Skiing was described as an EXPEDITION by many Albertans. The decision to enter into the arrangements needed to successfully negotiate this activity is major for the non-skier population.

Final Conclusion and Comment

The promotion of skiing and individual mountain ski facilities has historically targeted the present skier. A revue of major communication efforts illustrates the concentration on the young, athletic, upscale market and not on the two most potent segments for generation of new participants.

Although individual ski facilities must continue to attempt to expand their market share, consideration must be given to reallocating resources to attracting the non-skier. Of course the total ski industry should have this as a major goal in addition to increasing the ski frequency of present customers.

The key to attracting non-skiers is the removal of the major barriers, both perceived and real, that convince a person to reject this excellent form of recreation. These barriers have been identified in this study, together with suggested actions to remove them.

1.0 INTRODUCTION AND OBJECTIVES

In response to the Alberta ski industry's growing need to expand its market, the Alberta Zone of the Canada West Ski Areas Association and Alberta Tourism commissioned Marktrend Marketing Research Inc. to conduct a research study, in order to:

* assess the potential Alberta ski market among;
  - non-skiers
  - lapsed skiers, and
  - those who have only skied once, or twice, but not in the past three seasons
* behaviourially and demographically profile the total, and potential skier market;
* provide input into the directions that can be taken to facilitate maximum non-skier conversion possibilities.

The project was designed and managed by Marktrend Marketing Research, with contribution from Professor Peter W. Williams, Director, Centre for Tourism Policy and Research, Simon Fraser University, Burnaby, B.C.

2.0 METHODOLOGY

A four-phased methodology was undertaken to meet study needs.

Phase 1 - Preliminary Focus Groups

Six group discussions were conducted in Alberta from January 18 to 22, 1990, namely:

- Calgary (2 groups)
- Edmonton (2 groups)
- Grande Prairie (1 group)
- Medicine Hat (1 group)

to ensure that the quantitative sample design and question process accurately reflected the information needs of the Canada West Ski Areas Association and Alberta Tourism.

Participants ranged in age from 18 to 65 years, were not current downhill skiers, and may or may not have had previous experience with downhill skiing.

Detailed results of the focus groups are provided within.

Copies of the transcripts have been provided under separate cover.

Phase 2 - Quantitative Data Collection

A total of 1,400 completed interviews were gathered across Alberta among men and women aged 18 years or older, who had either never skied, or who had not skied this season, last season or the season before. The sample was randomly generated to reflect population proportions across the province, as follows:

Distribution of Completed Interviews	Number of Interviews
Northern Alberta	298
Athabasca	101
Edmonton/Lloydminster	102
Peace River	95
Central Alberta	298
Drumheller/East	100
Red Deer/Wainwright	98
The Parks	100
Southern Alberta	196
Lethbridge	98
Medicine Hat	98
Calgary CMA	303
Edmonton CMA	305
Total (50% male/50% female)	1400

All interviewing was conducted from Marktrend's offices in Calgary and Edmonton, utilizing our in-house Computer Assisted Telephone Interviewing (CATI) system. Each interview was approximately 12 minutes in length.

The results were processed and tabulated at Marktrend's Vancouver office, utilizing our Answer-Tabs computer program. The detailed findings are provided in this publication.

All data was collected between March 9 and March 30, 1990.

A single sample size of 1400 is accurate +/-2.7%, 95 times out of 100, as is a sample of 300 +/-5.7%; a sample of 100 +/-9.8%.

Phase 3 - Interpretive Focus Groups

Once preliminary quantitative data was assessed, two focus groups were conducted:

	Date
Red Deer (1)	April 10, 1990 - 7:00 p.m.
Calgary (1)	April 11, 1990 - 6:30 p.m.

in order to test the conclusions drawn in Phase 2.

Detailed results of the focus groups are provided within.

Copies of the transcripts have been provided under separate cover.

Phase 4 - Secondary Data Research

In conjunction with both the qualitative and quantitative phases, secondary ski market research was conducted from Marktrend's Calgary office utilizing articles from periodicals, as well as individual reports available through the Calgary Public Library, the University of Calgary Library and from the files of the client.

The results of this research are available in the Appendix: Non-Skier Study Literature Review.

3.0 CONCLUSIONS AND MARKETING CONSIDERATIONS

The following conclusions were drawn from the initial six focus group sessions, the results of the 1400 telephone interviews and the two subsequent interpretive focus groups.

1. Likelihood of Skiing

Approximately 8% of the non-skier population of Alberta were amenable to, or actively considering, downhill skiing within the next year. Those who were singles, or young married with children, offered the greatest potential.

Each segment has different motivations for participating.

Social Adventurer

Although males are slightly more likely to be considering skiing both sexes are motivated similarly.

- Peer pressure has strong influence. These respondents are in contact with more friends and co-workers who ski than any others. They are also aware of skiing's more demonstrative aspects such as showing off, risks and speed, fashion and the potential embarrassments that can occur.

- The thrill of speed is a major attraction for these skiers, as would be expected.

- Romance and the potential for meeting members of the opposite sex motivate younger skiers.

- The mountain and snow experience attracts those who are more athletic, together with being in the outdoors.

- The singles are more aggressively social than are their married counterparts. They demand a group situation, for this is their mental picture of skiing: having "fun" with members of their peer group.

Young Family

This segment of the population, between 18 - 34, have children. These parents are attracted to either introducing their younger children to skiing, an activity they were forced to stop when their children were born, or their older children are pestering their parents to take them skiing; both parent and child for the first time.

- The family experience has replaced the more gregarious socializing that characterizes younger singles skiing activities. Fathers and mothers can pass along their skills to their offspring and enjoy a day in the mountains.

2. Skiing Imagery

The non-skier respondents identified specific components of their perception of a ski-experience that would attract them and others to the sport, or could stop people from participating.

POSITIVE IMAGERY COMPONENTS

These include:

- Skiing is predominantly described as a fun but maybe scary activity - somewhat analogous to riding a roller coaster with the word "fun" being used consistently by respondents when describing their perception. Further probing uncovered the components of this term.

THE FUN ASPECT OF SKIING IS DEFINED AS:

- sharing the experience with friends and/or family;
- perhaps making embarrassing mistakes or having near accidents and then reliving them with their companions;
- participating in after-ski activity;
- achieving improvement in skiing technique;
- the exhilaration of being outside in the mountain environment;
- the excitement of the speed of skiing. This is appropriate only for the younger respondents.

Other positive imagery components are:

- for some, skiing is also an opportunity to show off their ski skill (real or imaginary);
- skiing provides an entrée for younger respondents to a perceived "inner circle"; a somewhat elite, successful group;
- skiing provides a get-away - a chance to forget city life - their jobs, problems and other mundane concerns: an exciting, pleasurable, perhaps romantic break from their normal routine.

The Alberta non-skiers' mental associations and expectations of a ski experience were dominated by the major mountain ski areas, Banff, Jasper, Whitefish, Panorama and, to a lesser extent, Whistler. Their local ski-hills are considered more as a playground for young, crazy teenagers or for diehard skiers. These respondents suggested that local facilities offer a poor substitute with bad snow conditions, short runs and inadequate physical plants. The mountain ski areas are the potential venue for any anticipated ski activity.

NEGATIVE IMAGERY COMPONENTS

The following barriers to beginning to ski were uncovered. These must be assumed to be stronger than the attractions for this non-skier group. These barriers were different for those who had skied previously, whether lapsed or novice skiers, than for the respondents who have never skied.

Those who have skied previously provided more definite reasons for having not continued their participating. Cost and time constraints, including child rearing, dominated the past skiers' reasons, especially for those with more experience. The non-skiers cited cost, time, fear and lack of any interest in the sport, but to a lesser extent that past skiers.

Further investigation indicated that the utility equation; worth of experience compared to resource commitments of time, money and personal safety, unequally weighted against the decision to participate.

Further analyses has shown that these perceived resource expenditure are as follows:

i) Time Commitments

Pre-ski Preparation

Being out-of-control when skiing is a major concern. Most non-skiers considered it would be necessary to spend considerable time to become somewhat comfortable with their ability to be in control. Most were hazy about the method they would use to achieve this. Although the mountain ski facilities are their anticipated goal, the local ski hill would be more convenient, although easily rejected. These smaller facilities, as has been previously expressed, do not have a positive image. Hence the non-skier is confused by the choice, and the time and energy needed to become proficient.

Non-skiers' fear of being out-of-control needs to be removed, before many can be converted.

Arranging a Ski Trip

Even if the non-skier has previously participated in the sport, they indicated that making the arrangements for a trip is considered to be problematic. They are unsure of equipment rentals (source and cost), unsure of the choice, quality and cost of hotels, and are nervous about

approaching the ski area. In general the arrangements would take time and be a major hassle. They need to increase their comfort level before the barrier can be removed.

The Number of Trips

Except for the Calgary respondents, most non-skiers indicated that time, cost and organizational constraints would reduce their potential ski trips to one or two per year. The logistics of the organization, the distance to major ski destinations and the anticipated total cost would curtail visits.

ii) Cost Commitments

Although monetary expense is one of the immediate top-of-mind reasons for not skiing, along with time constraints and fear, it has different characteristics for different market segments.

Younger non-skiers were much more concerned over costs, due to their lack of discretionary income. Because they constitute the most potent group for conversion to skiing, this barrier is a major concern.

Younger childless families and older families with children also provide a source for conversion to skiing. These two groups have higher discretionary incomes and a differing set of needs from skiing. Their reasons for not skiing are more related to time and logistical constraints, with cost being secondary.

Although the cost of the lift ticket is considered to be quite high, all respondents considered the associated expenses to be the crux of the problem. Their cost expectations were drawn by their anticipation of skiing in the mountains. Clothing and equipment prices are thought to be very high, as are transportation and accommodation costs. The lift ticket cost, and a weekend ski trip becomes a major event that requires planning for several months previous. AN EXPEDITION.

THE CONTRADICTORY EFFECT OF MAJOR MOUNTAIN SKI AREAS

A conclusion can be drawn that the predominance of mountain skiing imagery has attraction and repulsion effects on the non-skier. The necessary equipment and clothing must meet the needs of mountain skiing, thus the costs are high. The risks are great when skiing the perceived steep slopes thought to be found in mountain ski areas. On the positive side the resorts offer a complete set of activities for social enjoyment.

The emphasis should be to reposition skiing as not only occurring and being enjoyed in major mountain areas but also at local ski facilities. This could achieve the following:

- reduce the perceived and actual costs;
- reduce the planning requirement;
- reduce the perception of a major expedition;
- increase the overall accessibility;
- remove some of the fear caused by "steep and deep" images that are presently held;
- communicate on a more local level, allowing the message to become more meaningful.

Assuming the above can be accomplished, it must also be recognized that the potential skiers' ultimate goal or dream is to ski in the mountain areas. Thus any increase in the skier base generated from successful programs by local areas will eventually translate into increased mountain ski visits: local areas assuming a "feeder" or "farm-team" role.

3. Positioning

As has been stated previously the respondents in the focus groups expressed reservations regarding smaller local ski areas. To successfully implement the above strategy the following barriers to the non and lapsed skiers' acceptance of these community ski facilities must be recognized and perhaps addressed.

* Due to the geography in non-mountain Alberta the ski runs are necessarily short, normally situated on river banks. The respondents' perceptions were especially negative regarding this aspect of the facilities.

* Due to low snow accumulations, particularly in recent winters, the conditions are perceived to be poor, with either ice in the cold weather and slush otherwise. There was little awareness and few comments regarding snow making, grooming, etc.

* The support facilities at local ski areas, including the lodge, ski-shop, rental equipment, restaurant and changing areas were thought to be utilitarian at best.

* The skiers at these local hills were expected to fall into two categories:

    - younger teenagers who use the ski hill as a hang-out. These people are a negative influence.

    - ski die-hards who will ski in any conditions.

The local area is not described in successful, vibrant, aggressive terms, but as passive and mediocre, at best.

4. Packaging Considerations

The major conclusion that can be drawn from the study of Alberta's non-skier population is that the barriers to participation in skiing are both real and perceived. To entice skiers these barriers must be removed or at least lowered.

To test the strength of these barriers a specific package component of a ski trip were suggested to both urban and rural non-skiers. The package could include all or a combination of the following.

- A series of lower cost ski lessons at a local ski area designed for the novice or lapsed skier.
- A rental package including skis, boots and poles that would be available for these lessons and for the ski trip described later.
- A discount on clothing and peripheral equipment at a local ski store.
- A committed ski instructor for the total package.
- A comprehensive ski weekend including transportation, accommodation, two day lift tickets and perhaps meals, provided by the host ski instructor.
- Activities on the ski hill.
- A symbol of completion (badge, button etc.)

The overall response to the above was positive. The effect of this type of service bundling is to remove most of the non-skiers' fears regarding preparation and safety, equipment, costs, trip organization and embarrassment. Their level of comfort rises to an acceptable point that the major decisions regarding participating are reduced to the one final criterion: PRICE.

4.0 SUMMARY OF PRELIMINARY FOCUS GROUPS

4.1 Present Leisure Activities

Overall, members in the groups participated in a wide variety of activities in their leisure time. The younger groups in Calgary and Edmonton participated in more active and physically demanding sports than the older groups such as racquetball, ringette, volleyball, aerobics, rock climbing, martial arts, and running. Several members in the groups participated in sports on a regular basis during the week. In general, respondents with children had little or no time to devote to pursuing sports or hobbies due to the amount of time and energy required to care for their children. Most parents did participate in sports and leisure activities before they had children.

The relatively older groups, and the Medicine Hat group, tended to spend their leisure time in more relaxed sports or activities such as hunting, fishing, camping, home improvements, gardening, going to the movies, walking, reading, coaching, and skating. Several members in these groups had tried cross country skiing.

In general, the groups had a higher level of awareness of winter and indoor sports and hobbies than summer activities. Summer team sports such as baseball, soccer, bike riding, tennis and football were not top of mind for most respondents, but they do enjoy these sports during the warmer months.

For those group members who were involved in team sports, the social aspects of their activity were a major attraction and motivation to participate in the sport. They regarded team sports as more fun and enjoyed the social activities of their team subsequent to the game.

Sports in which members of the younger group wish to participate are generally uncommon and considered somewhat expensive, for example, parachuting, parasailing, water skiing, scuba diving, and white water canoeing. Others mentioned summer activities such as softball and golf. One or two members in the younger groups mentioned skiing.

Several members of the older groups would like to assume cross country skiing. They are attracted to the sport because of fitness reasons, fresh air, scenery, or to be with friends.

Several members in the groups, particularly the younger members, had at one time tried downhill skiing but did not pursue it after a very short period of time. Generally, they had attempted skiing once or twice, but as a result of a negative experience had no desire to pursue it any further.

4.2 Skiing in General

4.2.1 Images and Perceptions of Skiing

All groups had a strong negative top of mind image of skiing. The sport conjured up images of broken limbs, pain, accidents, fear, and high cost. This was true of both males and females, younger respondents as well as older ones. A few respondents in each group associated skiing with a pleasant past experience on a ski slope or the social, party elements of apres ski, but these images were not as prevalent as were the negative images. There was a significant element of fear in the minds of these respondents based on either their own, or friends', experiences. Some of these images, both pleasant and unpleasant, were based on respondents' personal experience with the sport while other images were observational or word of mouth.

Skiing was also perceived as a very expensive, fashionable, trendy sport. It was perceived as a luxury sport both in terms of cost and time. The cost is present in the required clothing, equipment, lift tickets, lessons, and for many travel and accommodation. The cost to become involved in the sport or to update equipment was the major barrier for several respondents.

With respect to time, skiing is perceived to require many more hours of preparation and travel than most other activities in which participated. Many respondents believe they just don't have the time. On the other hand, non-skiers recognize that those who do participate regularly in the sport do not necessarily have more time to spare, but rather, they regard skiing as a high priority in their lifestyle.

Secondary images of skiing related to the lifts, which in most cases were regarded as unstable, line ups, and lengthy lift rides. Also, some of those who participated in sports primarily for exercise did not perceive skiing as a fitness sport. Because of the time spent on lifts, skiing did not provide them with the steady exercise they enjoyed in sports such as racquetball, skating or cross country skiing.

Also, the perception among some is that downhill skiing has reached a social level in which an individual must be successful, rich, good looking and a good skier in order to feel comfortable on the slopes. This has lead to feelings of intimidation and reluctance to participate.

4.2.2 Main Attraction and Components of Skiing

The groups agree that the primary attractions to skiing are the social component and the exhilaration of skiing itself. The perception is that many people are motivated to participate in the sport by their friends or co-workers that ski. Others may use skiing as an avenue to increase their social circle. However, one must enjoy the actual physical activity to partake of it.

Other components of the sport act to enhance the experience, such as the fresh air, the surroundings, the thrill of speed, the challenge, getting away from the city, and the psychological stress release.

Typically, a downhill skier is characterized as outgoing, lively, trendy, more affluent than average, and young to middle aged.

4.2.3 Negative Perceptions of Skiing

Overall, the two major deterrents preventing respondents from trying the sport were the costs, as discussed above, and fear. Fear based on the perception that if they were to try skiing it would surely result in physical injury. Their fear is related to all aspects of being on the slopes from preparing for the lift chair to unloading from the chair, maneuvering down the hill, and participating in beginner lessons.

Relatively older respondents recognized that their images of the sport were probably antiquated. None the less, their perception dominated their behaviour patterns. For example they had an image of beginner skiers equipped with very long skis and struggling to gain control. Although they recognized that techniques for instructing beginners have likely advanced immensely, it did not reduce their fear of the sport.

Accessability to a ski hill was a major consideration in Edmonton and the rural communities, as skiing for a day would require at least four hours travel to arrive at a major ski area such as Banff. Many of the local hills were not perceived to provide respondents with their money's worth.

Another deterrent from skiing, particularly among young males, was the perception that arriving on the hill as a beginner would be embarrassing. Although this was a concern among only a few participants, it was deeply rooted and prevented them from attempting the sport.

A fear of heights, either due to the lift operation or the view from the top of the slope, also created a strong resistance to skiing.

On a personal level, many older group members are convinced they are physically incapable of learning to ski. Therefore, they are resistant to trying. They do not believe they have the physical co-ordination or strength necessary to ski. Their self confidence in this regard was very low. Also, the older groups have little or no confidence in the instructors they have encountered. Their experience or image of a ski instructor is one of an impatient teenage jock who has no instructor qualifications and does not relate to the older person's fear of the sport. Some group members would consider learning to ski again if they could be instructed by a more mature and patient instructor, in a group of older skiers. In this way, they would also avoid embarrassment or intimidation by younger individuals taking ski lessons. One respondent did comment that he did have a positive experience with a young university ski instructor. However, the instructor was very knowledgeable in physiology and was able to gain his group's trust. This resulted in an eagerness to learn and improve one's skiing abilities. However, predominantly, the perceptions and experience among many non-skiers was that the quality of instruction available was inadequate.

The perception among many group members, particularly the older groups, is that if they have not been skiers in their younger years, it becomes increasingly difficult to learn as one grows older. Most of this group recognizes that they must overcome their fears and have confidence in their physical abilities in order to try the sport.

Overall, the groups' perceptions of the dangers of the sport were instilled from two sources. Some had heard cases of injuries and deaths from their family or friends, while others based their fears on first hand experience. Skiing is viewed quite simply by many as an unorganized, chaotic event caused by inexperienced participants.

However, many group members have friends or children that thoroughly enjoy skiing and try to convince their non-skier friends to join them on the slopes. However, other skiers' positive experiences and enthusiasm are not sufficient to convert the non-skier.

4.3 General Knowledge and Price Perceptions

Overall, the groups had a good general knowledge of the type of equipment and clothing required for skiing. They were not aware of some specific terminology in the sport such as binding, brakes and, in general, were not aware of the technical advancements the industry has achieved.

Whether they have previously attempted skiing or not, renting their equipment rather than purchasing it is definitely an option they would consider for the first year. If they enjoyed the sport, they would then consider purchasing their own equipment. In terms of their price perceptions for equipment, they would expect skis and boots to cost approximately $200 - $300 each and poles $20 - $60. The price of an outfit would vary depending on personal taste, but would most likely cost between $300 - $500. The lift ticket would be between $25 - $32 and lessons for the beginner could be taken in the city or on the hill for about $60.

Generally, the perception among non-skiers is that although clothing and equipment are available at a lesser cost, one must be fashionably and, hence, expensively outfitted to appear on the slopes. Not surprisingly, this attitude was more common among females than males. The style factor also varied between mountains. Among some of the younger non-skiers in Edmonton, Banff was perceived as a very upscale, fashionable area while those who skied Lake Louise were less concerned with attire. Lake Louise was perceived by some to attract an outdoor, rugged, hard core whisky and beer individual who is only minimally concerned with his appearance. While some non-skiers in Edmonton and Grand Prairie would consider visiting a local hill, such as Snow Valley, appropriate for beginners, others believe that in order to get their money's worth they would make the trip to a major resort such as Banff, Lake Louise or Jasper.

4.4 Attractions of Skiing

The social aspect of skiing is one of the major attractions to the sport for many participants. Although a few participants perceived it as a solitary sport while one is skiing down the hill, it becomes a group affair to meet for lunch or at the end of the day for the apres ski activities. This attitude was countered by others who believe the social component of skiing can be increased by resting and conversing with others during a run. Overall, however, skiing is regarded as very social activity for the family and friends.

The groups believe the exhilaration of being at the top of a mountain and experiencing speed is the other major attraction to the sport. Associated with this is the beauty of the environment, experiencing the fresh air, nature, and escaping from the city.

Several other components of skiing act to attract participants to the sport as well. These include the challenge, which can be all consuming. In this way the sport also acts as a stress release in that the mind becomes completely absorbed in the moment. For those who progress in the sport it also provides an element of personal satisfaction.

Respondents in Edmonton and rural Alberta believe skiing has a more significant presence in the minds of Calgarians than Edmontonians due to their proximity to Banff and Lake Louise. The view of the mountains from Calgary is believed to create a continuous sense of awareness of the sport.

4.5 Barriers to Skiing

Overall the groups expressed two major barriers to skiing, fear of injury and cost. The view from the top of the slopes frightened many in the groups. This is a particulary strong barrier for those who are in the latter period of the life cycle and do not consider themselves particularly fit or strong.

The second major barrier is cost. It is perceived to be quite expensive to become involved in skiing, relative to some other sports the groups engaged in such as running, and racquetball. However, those who are avid skiers may not necessarily be in a higher income bracket than non-skiers, but rather have established skiing as a priority in their life. Skiing is easier to reject than are other sporting activities because of the perceived time, organization, effort and money required to participate in the sport.

The colder weather in Grand Prairie and Edmonton was also a deterrent. Several in this group were reluctant to prepare themselves for the cold weather and prefer to remain indoors.

As mentioned earlier, accessibility to a major ski area is also a consideration for non-skiers, particularly in Edmonton and Grand Prairie. Skiing at a destination resort such as Banff or Lake Louise involves transportation and accommodation costs which make the outing a major event, and not a regular occurrence. Skiing on the local hills is acceptable at the beginner level but does not provide a sense of money's worth at a higher ability level.

4.6 Potential For an Attitudinal Change

The commitment required to participate in skiing is considered one of the major barriers to the sport. This is a commitment in terms of time and money. Some respondents believe that to ski on a Saturday requires preparation beginning Friday evening and continues to recuperating on Sunday. Thus their entire weekend would be devoted to the sport. Transportation to and from the hill also becomes a burden. The suggestion was made that regularly available three day packages from Calgary and Edmonton, including transportation, group lodging, lift passes, and lessons would alleviate some of this burden.

Non-skiers also believe they would be more inclined to try skiing if ski resort personnel presented a more helpful and considerate attitude towards the beginner. They recommend that ski resort personnel assist beginners by offering services to familiarize beginners with the hill and place them in lessons among other skiers at their own level and age group.

Skiers also believe that in general the ski industry has concentrated on the avid skiers rather than the beginner, with its advertising and promotions. For example, non-skier have viewed films of adept skiers skiing straight down the mountain. This has instilled fear since this is believed to be the angle beginners will ski down the hill. Non-skiers would appreciate industry films focusing on the beginner and the method of learning to ski.

Overall, the groups indicated they have not completely eliminated skiing as a potential activity in their lifestyle. They recognize barriers within themselves and from the industry, but would be willing to consider the sport if it became more accessible for them, and their fears were either diminished or eliminated.

5.0 DETAILED QUANTITATIVE FINDINGS

5.1 Current and Potential Market Structure

5.1.1 Total Alberta Market Structure

One third (30.2%) of all Alberta residents indicate that they have never downhill skied, whereas nearly half (46.4%) have skied within the past three seasons. The remainder have not skied recently or frequently; one-fifth (17.1%) are lapsed skiers (three times or more but not in the past three seasons); less than one-tenth (6.3%) had only tried skiing once or twice.

Incidence of never downhill skiing is most prevalent in Central and Southern Alberta, current skiers are more likely to be found in Northern Alberta, whereas lapsed skiers are more likely to reside in Calgary.

(Reference: Table 1)

5.1.2 Projected Size of the Potential Non-Skier Market

Residents were asked how likely they would be to resume or start skiing in the next year, two years, and three to five years. Those who responded that they are very likely are the most accurate reflection of the potential for conversion. However, on a 6-point scale where 6 means "very likely" and 1 means "not at all likely", those giving a score of 5 may also be considered, although not to as strong a degree.

The highest potential for conversion to skiing occurs in the 18 to 34 year age bracket. Of the estimate 890,000 adult, current non-skiers in Alberta, approximately 47,900 [1] are potential skiers in the next year (rating a score of 6 - very likely); 36,400 [1] are between 18 to 34 years old. The potential increases to approximately 82,800 [1] for those who rate likelihood a 5 or 6; 64,800 [1] for 18 to 34 year olds. Within the next three to five years, likelihood of resuming, or starting to ski increases by 7% to 16% among those under 35 years.

(Reference: Table 2)

[1] Potential conversion figures are derived from Statistics Canada, 1986, Alberta population figures as applied to estimated current non-skiers according to their likelihood of skiing within a specific time frame.

5.1.3 Demographic Profile of Those Likely, and Not Likely, to Ski in the Next Year

Those rating likelihood of downhill skiing a 4, 5 or 6 (on the 6-point, very likely to not at all likely scale) tend to:

- be younger (aged 18 - 34);
- have completed some university;
- work in sales/clerical/technical/skilled labour occupations;
- earn less than $25,000 or more than $55,000 in annual household income, and
- be unmarried

as compared to the total population.

Conversely, residents who state they are not likely to ski in the next year are:

- older (aged 45+)
- less educated (completed some high school) and;
- retired

(Reference: Table 3)

Table 1

Total Alberta Market Structure

	Total	Calgary	Edmonton	Northern Alberta	Central Alberta	Southern Alberta
BASE	(2614)	(589)	(561)	(653)	(495)	(316)
	%	%	%	%	%	%
Never skied	30.2	25.3	29.4	29.7	(32.5)	(38.0)
Novice						
Skied once/twice	6.3	5.8	6.6	5.0	7.3	(8.2)
Lapsed						
Skied three or more times	17.1	(20.3)	18.4	11.0	(20.4)	15.8
Skied past 3 years	46.4	48.6	45.6	(54.3)	39.8	38.0
Total	100	100	100	100	100	100

Table 2

Projected Size of Potential Skier Market

Q6a. How likely to ski in next year.
Those responding very likely (6)*

BASE = 1400

		Age					
	Total	18-24	25-34	35-44	45-54	55-64	65+
% of sample agreeing	5	13	7	4	3	1	-
Approximate potential among non-skier market	47,918	18,165	18,254	7,085	3,471	943	-

Those responding (5 and 6 combined)*

		Age					
	Total	18-24	25-34	35-44	45-54	55-64	65+
% of sample agreeing	8	24	12	7	4	1	-
Approximate potential among non-skier market	82,798	33,536	31,293	12,398	4,628	943	-

* Rating Scale: 6 = Very likely, to
1 = Not at all likely

Table 2 (continued)

Projected Size of Potential Skier Market

Q6b. How likely to ski in next two years.

Those responding very likely (6)*

BASE = 1332

	Total	Age 18-24	25-34	35-44	45-54	55-64	65+
% of sample agreeing	4	15	7	4	2	-	-
Approximate potential among non-skier market	48,614	20,960	18,255	7,085	2,314	-	-

Those responding (5 and 6 combined)*

	Total	Age 18-24	25-34	35-44	45-54	55-64	65+
% of sample agreeing	9	30	14	8	4	-	-
Approximate potential among non-skier market	97,226	41,920	36,509	14,169	4,628	-	-

* Rating Scale: 6 = Very likely, to
1 = Not at all likely

Table 2 (continued)

Projected Size of Potential Skier Market

Q6c. How likely to ski in next 3 - 5 years.

Those responding very likely (6)*

BASE = 1274

	Total	Age 18-24	25-34	35-44	45-54	55-64	65+
% of sample agreeing	6	16	11	6	2	1	-
Approximate potential among non-skier market	64,927	22,357	28,686	10,627	2,314	943	-

Those responding (5 and 6 combined)*

	Total	Age 18-24	25-34	35-44	45-54	55-64	65+
% of sample agreeing	12	30	22	12	4	1	-
Approximate potential among non-skier market	126,116	41,920	57,371	21,254	4,628	943	-

* Rating Scale: 6 = Very likely, to
1 = Not at all likely

Table 3

Likelihood of Skiing in the Next Year.

	Total	Likely	Somewhat Unlikely	Not at All Likely
BASE	(1400)	(204)	(223)	(971)
	%	%	%	%
Area				
Northern Alberta	21	21	22	21
Central Alberta	21	21	23	21
Southern Alberta	14	16	12	14
Calgary	22	18	23	22
Edmonton	22	24	20	22
Age				
18 - 24	8	(21)	12	5
25 - 34	29	(43)	(42)	23
35 - 44	28	25	30	28
45 - 54	14	7	11	(17)
55 - 64	11	2	4	(14)
65 +	10	1	1	(14)
Education				
Some high school	18	14	11	(21)
Graduated high school	27	30	23	27
Vocational/technical college	31	32	(34)	30
Some university	8	(12)	9	7
Completed university	14	12	(21)	13
Occupation				
Professional/executive/ management	24	27	(32)	22
Sales/clerk/technical	18	(24)	20	17
Skilled/police	16	(21)	(21)	14
Unskilled	4	5	4	4
Rural	6	3	4	7
Homemaker	13	10	9	(15)
Retired	11	1	3	15
Student/unemployed	5	8	7	5

Table 3 (continued)

Likelihood of Skiing in the Next Year.

	Total	Likely	Somewhat Unlikely	Not at All Likely
BASE	(1400)	(204)	(223)	(971)
	%	%	%	%
Income				
Less than $25,000	23	(27)	20	22
$25,000 to less than $35,000	19	16	18	19
$35,000 to less than $55,000	24	23	(30)	23
$55,000 +	17	(21)	20	16
Marital Status				
Married	73	61	67	76
Other	27	(39)	32	23

5.2 Potential Market Analysis By Imagery Clusters

During the conduct of the interview, residents were asked for their level of agreement, or disagreement, with a number of skiing imagery statements (questions 9 to 36) that covered various topic areas, ie:

- Knowledge
- Cost
- Difficulty
- Danger/fear
- Rewards
- Social aspects

The resultant data was then input into Marktrend's BMDP cluster analysis program, which sorted the responses into groups according to their commonality or dissimilarity.

Six distinct cluster groups emerged from our analysis:

· Social Adventurer	(14.7%)
· Young Family	(21.1%)
· Rural Sedentary	(12.3%)
· Upwardly Mobile	(17.7%)
· Fearful Elder	(17.0%)
· Disinterested	(17.3%)

In terms of non-skier conversion the Social Adventurer and the Young Family offer the greatest potential of the six groups. Both indicate the highest likelihood of skiing in the next year, two years or three to five years. However, perceived costs for downhill skiing are prohibitive. Factors that discriminate these two groups are as follows:

Social Adventurer

- Young and unmarried;
- skilled labour occupation;
- lower than average annual income;
- he/she imagines skiing to be:
  - thrilling/exciting
  - dangerous and difficult, but
  - rewards are high, and
  - there is a strong social aspect involved.

Young Family

- Young (18 - 34 years), and urban;
- has previously skied;
- pictures skiing as:
  - fun/exciting
  - an outdoor, in the mountains escape
  - a good family sport, recreation
  - not difficult, with little danger
- the perceived barriers are:
  - money, distance, and they are raising a young family
- is very athletic, and knows many others who downhill ski.

For both groups, an all inclusive, low cost ski package which could include transportation, accommodation, reduced rates on ski rentals and lift tickets, would be a definite enticement to take up skiing.

For the Social Adventurer, the package could be positioned as a "fun weekend with the gang", whereas given the Young Family orientation, an image of catering to a family's needs may be more appropriate. As well, the cost, distance and danger aspects may be an outgrowth of the "mountain"

imagery and, as such, inducement to venture to the local ski hills may alleviate many concerns and assist in non-skier conversion.

The remaining four cluster groups offer little, or no potential for immediate future conversion. They are:

The Disinterested

- male;
- lapsed skier;
- well educated;
- mid to upper income;
- cost is not a factor, neither is danger, fear, knowledge or difficulty;
- very athletic, he is just not interested in resuming skiing.

Upwardly Mobile

- male;
- novice skier;
- some advanced education;
- somewhat higher income;
- professional/management or rural occupation;
- somewhat athletic, likes golf, racquet sports and jogging;
- perceives skiing as trendy, glamorous, but;
- has neither the time or the inclination to downhill ski.

Rural Sedentary

- female;
- middle aged or older;
- not likely to have skied;

- not well educated;
- low household income;
- either a homemaker or retired;
- imagines skiing to be dangerous, difficult;
- doesn't know how to learn to ski and doesn't want to ski;
- is not athletic and doesn't know others who ski.

Fearful Elder

- female;
- older;
- urban;
- not likely to have skied, or tried once or twice;
- middle income;
- married;
- not athletic;
- likely to be a homemaker or retired;
- may have experienced a past skiing injury and, as a consequence, is very fearful and has no interest in downhill skiing.

(Reference: Tables 4 to 9)

Table 4

Skiing Patterns

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Ever been downhill skiing							
Yes	44	33	(63)	17	(54)	34	47
No	56	(67)	37	(83)	46	(66)	53
Likelihood skiing (score 5 or 6)							
Next year	8	(13)	(18)	1	5	1	6
Next two years	9	(16)	(22)	1	4	-	8
Three to five years	14	(18)	(28)	2	9	4	13
OF THOSE WHO SKIED:							
Number of times downhill skied							
Once	17	(26)	15	(38)	16	(21)	11
Twice	10	9	8	7	13	(17)	4
Three +	72	63	76	55	70	59	(85)
Average number of days skied per season							
Mean	12.8	13.1	14.7	14.3	9.2	9.3	14.7

Table 5

Demographics

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Area							
Northern Alberta	21	22	24	(28)	19	16	20
Central Alberta	21	23	18	18	24	25	21
Southern Alberta	14	18	14	12	13	15	12
Calgary	22	21	17	23	23	(27)	22
Edmonton	22	17	(27)	20	21	18	25
Gender							
Male	50	50	52	27	(73)	33	(59)
Female	50	50	48	(73)	27	(67)	41
Age							
18 - 24	8	(13)	(14)	3	7	4	6
25 - 34	29	27	(42)	15	32	20	30
35 - 44	28	28	26	21	(33)	29	27
45 - 54	14	11	10	(19)	14	17	18
55 - 64	11	12	4	15	10	(15)	10
65 +	10	9	4	(26)	4	(15)	7
Education							
Some high school	18	22	14	(31)	13	20	15
Graduated high school	27	30	29	28	22	28	25
Vocational/technical school	31	27	(35)	23	(35)	30	30
Some university	8	9	7	4	(12)	6	11
Graduated university	14	10	14	10	16	15	(18)

Table 5 (continued)

Demographics

	Total	Clusters: Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Occupation							
Professional/executive/ management	22	16	17	10	(29)	17	(30)
Sales/clerical/ technical	18	18	20	12	17	19	(23)
Skilled/police	16	(21)	18	9	20	11	15
Unskilled	4	3	4	6	4	5	5
Rural	6	5	4	5	(9)	8	4
Homemaker	13	12	15	(21)	7	(19)	8
Retired	11	11	4	(29)	5	(17)	9
Student/unemployed	4	7	4	3	6	3	4
Income							
Less than $25,000	23	(28)	25	(31)	16	21	16
$25,000 to less than $35,000	19	(25)	19	19	(27)	(30)	(27)
$35,000 to less than $55,000	24	21	25	20	(27)	24	23
$55,000 +	17	11	17	[8]	(20)	17	(28)
Marital Status							
Married	72	[65]	70	71	75	(79)	74
Other	27	(35)	29	28	25	[21]	26

Table 6

Skiing Imagery

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Unaided Skiing Imagery							
Powder snow	15	12	(20)	7	16	12	17
Broken bones/injury	13	15	5	15	13	(20)	11
Mountains	12	11	(16)	11	12	9	13
Fun	11	13	(21)	9	5	7	10
Too expensive	9	8	(14)	2	(15)	5	6
Dangerous	7	7	5	(11)	7	(11)	5
Fear, being afraid	6	(11)	3	9	1	(14)	3
Speed/fast	6	8	7	6	4	5	5
Cold weather	5	5	2	4	5	6	(9)
Outdoors/fresh air/ scenery	5	(8)	(10)	2	3	3	4
Falling/slipping	5	(10)	2	(11)	4	7	2
Excitement/thrill	3	(5)	(7)	2	1	2	2
Pain	3	4	1	2	2	5	3
Previous skiers - Why not ski now?							
Too expensive	32	29	(40)	31	(37)	20	23
No time	29	31	32	28	30	20	30
No longer physically able	17	24	16	21	14	15	18
Too far to travel	13	7	(19)	3	14	11	11
Raising a family	9	6	(13)	3	8	5	7
Fear	8	9	4	(17)	2	(23)	7
Other interests	6	4	4	3	8	7	(11)
Bad initial experience	3	4	2	3	2	(10)	1
No one to ski with	2	3	1	(7)	4	4	1
Past injury	2	4	1	-	2	(6)	3

Table 7

Skiing Imagery

(Mean Level of Agreement, 6 - 1 Agree/Disagree Scale)

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
Knowledge							
Not sure how to learn to ski	2.7	(4.1)	2.0	(5.5)	2.2	1.6	[1.8]
Not enough info regarding how to ski	2.6	(3.9)	2.4	2.8	2.4	2.5	[1.8]
Cost							
Cost of equipment too expensive	4.7	5.1	4.8	5.0	4.8	4.8	[3.9]
Important to have easy, inexpensive transport to ski area	4.6	5.0	4.8	4.8	4.1	4.6	4.2
Skiing would take up too much time	3.2	3.4	2.6	3.6	(4.2)	3.2	[2.6]
Low cost, all inclusive beginners package would entice me to ski	3.0	(5.0)	(5.2)	[1.6]	2.6	[1.6]	[1.7]
Difficulty							
Skiing is physically demanding	4.7	5.0	4.5	(5.1)	4.3	5.0	4.3
Skiing seems like a very fast sport	4.5	(5.0)	4.3	(5.0)	[3.8]	(5.1)	4.1
It's harder to learn downhill skiing than other sports, eg. cross country skiing, tennis	3.3	(4.3)	[2.5]	(4.5)	2.8	(4.1)	[2.3]

Table 7 (continued)

Skiing Imagery

(Mean Level of Agreement, 6 - 1 Agree/Disagree Scale)

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
Danger/Fear							
For someone who knows how, skiing is not dangerous	4.1	4.0	4.7	4.6	3.3	4.0	4.2
Afraid of being out of control	3.6	4.8	2.3	5.3	2.7	5.3	2.2
Ski hills are very steep	3.5	4.2	3.0	4.4	3.3	4.1	2.7
Skiers take more risks than non-skiers	3.3	4.3	2.9	3.8	3.3	3.7	2.3
Chances of serious injury are much less than five years ago	3.4	3.7	3.6	3.9	2.9	3.3	3.3
Ski lifts are scary	3.1	3.7	2.3	4.3	2.6	4.2	2.1
Rewards							
Improvements in clothing, equipment have made skiing easier, more enjoyable	5.0	5.2	5.2	5.5	4.2	5.1	5.1
Skiing's strongest attraction is getting out of town, into mountains	4.6	5.0	5.0	4.6	3.7	4.7	4.4
Learning to ski must be very rewarding	4.5	5.0	4.9	4.9	3.5	4.3	4.4

Table 7 (continued)

Skiing Imagery

(Mean Level of Agreement, 6 - 1 Agree/Disagree Scale)

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
Social							
Skiing equally attractive to men, women	5.5	5.6	5.7	5.6	[4.8]	5.5	5.5
Good family sport	5.1	5.4	(5.5)	5.4	4.1	5.1	5.4
Skiing is a recreational activity, not competitive sport	4.9	5.0	(5.2)	5.0	4.4	4.8	4.9
Skiers like to show off to friends	3.4	(4.3)	3.3	3.5	(3.8)	3.4	[2.6]
Too many, more important to party than ski	3.1	(3.7)	[2.6]	3.2	(3.7)	3.2	[2.5]
Prefer team sports to individual activities eg. skiing	3.0	(3.7)	2.5	3.4	2.9	3.3	2.6
Many take up skiing because it is glamorous, trendy	2.9	(3.6)	2.5	2.6	(3.6)	3.1	[2.3]
Skiing for younger people	2.8	3.0	(2.0)	3.8	3.1	(3.5)	[2.1]
Sometimes I feel left out because I don't ski	2.2	(3.7)	2.3	2.0	1.9	1.8	[1.6]
Beginners look silly, I would feel embarrassed in front of friends	2.2	(3.4)	[1.5]	2.4	2.3	2.3	[1.5]

Table 8

Skiing Imagery

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Non skiers - Why never skied?							
No time	19	21	22	19	(26)	12	16
Too expensive	18	(22)	(29)	13	19	15	11
No interest	16	7	9	15	(25)	17	(25)
Fear	16	(20)	10	(23)	5	(23)	12
No longer physically able	11	12	11	11	7	12	13
Too far to travel	10	9	11	11	(13)	11	7
No opportunity/no local place to ski	7	8	(11)	9	5	6	5
Didn't learn when young	6	7	6	(10)	4	6	5
Other interests	4	4	6	4	5	5	4
Nothing in particular	11	(17)	8	8	11	9	11
Main attraction of skiing							
Fun/exhilaration	35	36	(41)	36	29	28	(41)
Being outdoors/on the mountains	32	28	(39)	32	26	33	34
Thrill/excitement	23	26	23	22	20	24	22
Socializing	19	17	20	18	(26)	17	13
Exercise	18	15	17	17	15	19	(23)
Getting away	16	17	17	10	15	19	13
Challenge	13	16	13	12	12	14	12
Experience the speed	8	8	7	8	6	7	10
Beautiful scenery	7	3	8	7	5	8	9
Good recreation	6	5	6	6	6	8	6
Keeping fit	5	5	6	6	2	4	7
Family gathering	3	3	(6)	3	2	3	2
Trendy/glamorous	3	4	2	2	(7)	3	1

Table 8 (continued)

Activities Participated Past Two Years

		Clusters					
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Swimming	26	25	(34)	17	22	28	24
Bicycling	19	18	(24)	12	15	22	21
Camping	17	13	(23)	15	20	17	15
Fishing	16	14	18	13	17	14	19
Softball/baseball	16	17	(23)	9	19	10	16
Hiking	15	17	17	6	14	15	(20)
Walking	14	14	12	(20)	4	(19)	14
Skating	13	14	(18)	11	11	11	12
Cross country skiing	13	12	14	11	9	13	16
Golf	12	10	(16)	4	(17)	11	13
Curling	11	11	12	12	10	9	13
Hockey	10	8	(15)	4	12	5	10
Bowling	9	12	6	13	7	12	7
Racquet sports (gen.)	8	6	10	1	(12)	7	9
Boating/sailing	7	4	(10)	3	7	7	9
Tennis	6	5	(11)	3	6	5	7
Snow sports (gen.)	6	6	8	5	7	4	5
Jogging/running	6	4	(10)	2	(9)	3	7
None	12	15	6	(22)	12	14	9

Table 9

Influences on Skiing

		Clusters				
	Total	Social Adventurer	Young Family	Rural Sedentary	Upwardly Mobile	Fearful Elder	Disinterested
BASE	1391	204	293	171	246	236	241
	%	%	%	%	%	%	%
Know others who ski							
Personal friends	71	74	(85)	[49]	69	67	(76)
Other members of immediate family	56	59	60	61	[44]	60	55
Co-workers	49	48	(57)	[24]	(57)	[40]	(56)
Girlfriend/boyfriend/ spouse	20	26	(35)	[5]	[10]	17	18
Level of Athleticism							
Very/quite athletic	24	23	(36)	7	23	16	(30)
Somewhat athletic	42	40	(47)	35	(50)	40	38
Not too/not at all athletic	34	36	17	58	27	(43)	31

5.3 General Skiing Patterns

Somewhat less than half of the current non-skiers (44%) indicated that they had, in fact, skied at some point in their lives.

(Reference: Table 10)

Of those who had skied, most (72%) had participated three or more times, while the rest had only skied once (17%) or twice (10%).

(Reference: Table 11)

Those who were more frequent skiers (3 or more times) are somewhat more likely to have skied more recently than those with less experience.

(Reference: Table 12)

As well, the frequent skiers averaged 12.8 days of skiing per season.

(Reference: Table 13)

The demographic profile varies among past skiers, and those who have never skied.

Residents who have never skied, and do not know anyone else who skis, are more likely to be:

- from Northern Alberta;
- older (aged 65+);
- less educated (completed some high school);
- rural or retired workers;
- earning lower incomes (less than $25,000), and;
- unmarried.

Those who have never skied, but have family, friends or acquaintances who ski profile similarly to the total non-skier population (never skied, novices and lapsed skiers).

Novices (only skied once or twice), tend to:

- reside in Northern Alberta;
- be younger (aged 18 to 34);
- have graduated high school or completed some university;
- be occupied in sales/clerical/technical or skilled labour positions;
- be married; and
- be somewhat likely to resume skiing in the future.

Lapsed skiers (had skied three or more times) are best characterized as:

- Calgary residents;
- young (25 - 34 years old);
- having some, or completed university;
- professionals/executives/managers;
- earning $55,000 or more;
- being somewhat likely to resume skiing in the future.

(Reference: Table 14)

Those who have not downhill skied in the past three seasons state that it is too expensive, they don't have the time and it is too far to travel, they are afraid to ski, are no longer physically able to ski, they have family commitments and other interests. As well, 10% overall state that they just are not interested in downhill skiing.

(Reference: Table 15)

Those who have never tried downhill skiing state similar reasons to those who are lapsed skiers;

- lack of time, interest;
- too expensive;
- afraid to try skiing;
- not physically able, and;
- it is too far to travel.

(Reference: Table 16)

Table 10

Ever Been Downhill Skiing

	Total
BASE	1400
	%
Yes	44
No	56

Question 1b.

Table 11

Number of Times Downhill Skied

	Total
BASE	611
	%
Once	17
Twice	10
Three or more times	72
Don't know	1

Question 1d.

Table 12

Years Ago Went Downhill Skiing

	Total	Downhill Skied	
		Once/Twice	3+
BASE	611	165	437
	%	%	%
3 - 5	36	31	40
6 - 10	28	25	28
11 +	35	41	32
Mean:	12.4	12.3	12.1

Question 3a.

Table 13

Average Number of Days Skied Per Season

	Total
BASE	446
	%
1 - 3	34
4 - 10	29
11 +	34
Mean:	12.8

Question 3b.

Table 14

Demographics of the Current Non-Skier

		Skiing Patterns			
	Total	Never skied, knows no one who skis	Never skied	Novices (1 - 2X)	Lapsed (3 Times +)
BASE	(1400)	(98)	(789)	(165)	(437)
	%	%	%	%	%
Area					
Northern Alberta	21	(33)	25	(33)	16
Central Alberta	21	15	20	22	23
Southern Alberta	14	18	15	16	11
Calgary	22	18	19	21	(27)
Edmonton	22	15	21	22	23
Age					
18 - 24	8	6	6	(12)	10
25 - 34	29	10	21	(38)	(39)
35 - 44	28	28	30	30	23
45 - 54	14	13	16	13	12
55 - 64	11	14	13	3	9
65 +	10	(28)	13	4	6
Education					
Some high school	18	(38)	(25)	12	9
Graduated high school	27	31	27	(35)	25
Vocational/technical college	31	20	31	34	29
Some university	8	1	6	(11)	(11)
Completed university	14	3	10	7	(25)
Occupation					
Professional/executive/ management	24	7	22	24	(32)
Sales/clerk/technical	18	12	17	(26)	18
Skilled/police	16	12	15	(20)	15
Unskilled	4	4	5	4	3
Rural	6	(10)	7	4	5
Homemaker	13	15	14	13	12
Retired	11	(30)	14	4	10
Student/unemployed	5	8	5	4	5

Table 14 (continued)

Demographics of the Current Non-Skier

		Skiing Patterns			
	Total	Never skied, knows no one who skis	Never skied	Novices (1 - 2X)	Lapsed (3 Times +)
BASE	(1400)	(98)	(789)	(165)	(437)
	%	%	%	%	%
Income					
Less than $25,000	23	(48)	25	17	21
$25,000 to less than $35,000	19	14	20	22	16
$35,000 to less than $55,000	24	7	22	27	26
$55,000 +	17	6	15	18	(23)
Marital Status					
Married	73	68	72	(77)	71
Other	27	(31)	27	23	28
Likelihood of skiing (rating 5 or 6)					
Next year	8	-	6	11	(12)
Next 2 years	9	2	7	(13)	11
Next 3 - 5 years	12	5	10	16	(18)

Table 15

Reasons Not Skied Past Three Seasons*

	Total	Downhill Skied	
		Once/Twice	3+
BASE	611	165	437
	%	%	%
Too expensive	32	30	33
Don't have the time	29	30	29
No longer physically able (injury, doctor's orders)	17	8	20
Too far to travel	13	14	13
Have small/young children/ raising a family	9	2	11
Fear/afraid to try	8	12	6
Pursue other interests/other sports	6	5	7
Bad initial experience with friends	3	9	1
Not interested/don't like it	10	15	8

* Major Mentions, Only.

Question 2.

Table 16

Reasons Never Downhill Skied*

	Total
BASE	789
	%
Don't have the time	19
Too expensive	18
No interest in it	16
Fear/afraid to try	16
No longer physically able (injury, doctor's orders)	11
Too far to travel	10
Did not have the opportunity/no place to ski in my area	7
Didn't learn to ski when young/too old to learn now	7
Pursue other interest/other sports	4
Nothing in particular	11

* Major Mentions, Only.

Question 4.

5.4 Activities Participated In Past Two Years

Non-skiers who have never skied, and do not intend to ski within the next year have, generally, been less physically active than those with past patterns, or future intention to ski.

Swimming is the most frequently mentioned activity of the past two years (26%, total), followed by:

- bicycling (19%)
- camping (17%)
- fishing (16%)
- softball (16%)
- hiking (15%)
- walking (14%)
- skating (13%)
- cross country skiing (13%)
- golf (12%)
- curling (11%)
- hockey (10%)

All other activities received less than 10% of individual mentions.

(Reference: Tables 17, 18)

Table 17

Activities Participated Past Two Years*

	Total	Skiing Patterns: Never Skied	Once/ Twice	Lapsed 3+
BASE	1400	789	165	437
	%	%	%	%
Swimming	26	23	(30)	(30)
Bicycling	19	16	21	(24)
Camping	17	16	(22)	19
Fishing	16	16	18	16
Softball or baseball	16	16	15	17
Hiking	15	13	(20)	(18)
Walking	14	14	15	13
Skating	13	12	13	(14)
Cross country skiing	13	11	11	(16)
Golf	12	12	8	16
Curling	11	12	14	10
Hockey	10	7	11	13
Bowling/lawn bowling	9	9	(13)	7
Racket sports (gen.)	8	5	9	(12)
Boating or sailing	7	6	9	8
Tennis	6	6	(10)	7
Snow sports (gen.)	6	6	6	6
Jogging or running	6	4	(10)	8
None	12	(16)	5	9

* Major Mentions, Only

Question 5.

Table 18

Activities Participated Past Two Years*

		Likelihood of Skiing in Next Year		
	Total	Likely	Somewhat Unlikely	Not at all Likely
BASE	1400	204	223	971
	%	%	%	%
Swimming	26	(34)	28	23
Bicycling	19	(28)	(23)	16
Camping	17	19	(21)	17
Fishing	16	16	17	16
Softball or baseball	16	(26)	(25)	12
Hiking	15	(20)	15	15
Walking	14	7	9	16
Skating	13	(17)	16	11
Cross country skiing	13	15	16	12
Golf	12	14	(16)	11
Curling	11	13	12	11
Hockey	10	(18)	(17)	6
Bowling/lawn bowling	9	8	7	10
Racket sports (gen.)	8	11	(16)	5
Boating or sailing	7	10	6	7
Tennis	6	8	(14)	4
Snow sports (gen.)	6	(9)	7	5
Jogging or running	6	8	(12)	5
None	12	6	4	(16)

* Major Mentions, Only

Question 5.

5.5 Projected Skiing Patterns

When asked what would be preferred if they were to resume skiing or go for the first time, 72% stated that they would take a series of lessons, in a ski area, from an instructor.

(Reference: Table 19)

Most (78%) would, initially, ski in a local ski area and would expect to ski (on average) 11.3 days per season.

(Reference: Tables 20, 21)

Table 19

Projected Pattern if Taking Up Skiing

	Total
BASE	1400
	%
Take a series of lessons in a ski area from an instructor	72
Try it yourself	14
Have a friend show you how	13

Question 38.

Table 20

Where More Likely to Ski

	Total
BASE	1400
	%
Local ski area	78
Major resort	19
Don't know	3

Question 39.

Table 21

Number of Days Expected to Ski per Season

	Total
BASE	1400
	%
0	2
1 - 3	10
4 - 6	24
7 - 9	10
10	15
11 - 15	13
16 +	18
Don't know	8
Mean Number of Days	11.3

Question 42.

5.6 Awareness of Ski Areas, and Costs of Lift Tickets

The major ski areas in Alberta, such as Sunshine (21%), Banff (20%), Lake Louise (19%) and Jasper (17%) are the areas that are most likely to first come to mind for most of the non-skier market.

(Reference: Table 22)

In addition, residents have a reasonable expectation as to the cost of a one day, Alberta ski lift ticket: mean amount $29.83.

(Reference: Table 23)

Table 22

Ski Areas in Alberta that First Come to Mind*

BASE	Total 1400 %
Sunshine	21
Banff	20
Lake Louise	19
Jasper	17
Rabbit Hill	6
Marmot	5
Canada Olympic Park	4
Nakiska	3
Norquay	2
Don't know	5

* Major Mentions, Only.

Question 40.

Table 23

Average Perceived Cost of One Day Alberta Ski Lift Ticket

	Total
BASE	1400
	%
$3 - $10	4
$11 - $15	6
$16 - $20	16
$21 - $25	17
$26 - $30	20
$31 +	17
Depends on resort	1
Don't know	20
Mean Amount:	$29.83

Question 41.

5.7 Skiing Advertising Awareness

Slightly more than one half of all current non-skiers (55%) state that they have recently heard advertising or media reporting about skiing.

(Reference: Table 24)

Ski conditions and reports on T.V. Account for 25% of ad details recalled; ski packages and ski centres for 21%; celebrities and events for 16%. Very few (6%) relate the recent tragic deaths by avalanche, or accidents.

(Reference: Table 25)

Table 24

Recent Skiing Advertising Awareness

	Total
BASE	1400
	%
Yes	55
No	43
Don't know	2

Question 43.

Table 25

Advertising Details Recalled*

	Total
BASE	773
	%
Regular ski condition reports	15
Advertising ski packages	12
Ski reports on T.V.	10
Advertising for ski centres	9
News about ski celebrities	8
Major events - ski racing, olympics	8
Accidents/people who have died, caught in avalanche	6
Magazine ads	6
Commercial about skiing Lake Louise	6
All kinds of advertising (gen.)	5
Sales on ski items	5
Don't know	8

* Major Mentions, Only

Question 44.

6.0 SUMMARY OF INTERPRETIVE FOCUS GROUPS

Two follow-up focus groups were conducted with non-skiers in Calgary and Red Deer. Respondents were aged 25 - 45, predominantly white collar, had skied only once, skied more than three years ago, or had never skied. The focus groups were conducted to obtain reaction to potential marketing and promotional concepts that previous qualitative and quantitative research had suggested. Specific discussion also centered on imagery associated with skiers and skiing, perceived barriers to skiing and the factors that may encourage trial or retrial.

6.1 Reasons for Skiing

Respondents from both groups suggested a wide variety of reasons to ski. The "fun" "thrill" and "excitement" aspects were most frequently mentioned. Just as important, though, were the elements that constitute apres ski. Other responses included the exercise one receives from skiing plus the physical beauty of the scenery.

Local areas are perceived to be less intimidating, more accessible and generally considered to be not as expensive as the major resorts. The mountains require major planning and expense. The mountains are considerably more intimidating in two respects. One, the mountains are more dangerous; they are steeper. Two, the act of going to the mountain is a planned event, not an impulse one. This is especially true for those with families. A trip to the mountain means a longer, more "dangerous", drive. You would have to stay at least one night, as the distance and energy required to return home precludes same day returns. Local mountains are better on which to train, and have fewer line-ups. The bigger mountains provide the "challenge" that some residents find appealing. Skiing is considered to be a form of relaxation more than a sport. A sport connotates competition with others on an above average level of expertise. An integral part of skiing is the apres components. It is the overall combination of elements of the skiing experience that makes it relaxing. For some respondents, just the act of "getting out of the city" makes the whole skiing experience worthwhile.

6.2 Imagery of Skiers

Most respondents in Calgary and Red Deer perceive skiers to be younger, 15 - 25, single, wealthy, or their parents are wealthy. Others suggested that skiers were slightly older and who did not have children or older teenagers at home. In both cases, "skiers" are visualized as having the very latest fashions, and an above average income would be dressed appropriately.

Skiers are also considered to be very sociable, as apres ski is an important component of the skiing experience. It is also more likely that skiers share other similar likes and dislikes. Skiers are not necessarily strong athletically, although some degree of physical prowess is an asset.

6.3 Barriers to Skiing

Respondents in both groups voiced a number of specific barriers to skiing. Perhaps the most predominant barrier was the perceived high costs associated with skiing. The cost of equipment, accommodation, food, lift tickets, transportation, day care, and activities associated with apres ski are thought to be beyond their means. Respondents with families suggested that the price of lift tickets alone (@ $15 - $30 ea) were prohibitive. The cost of skiing is thought to be expensive for individuals as well. It was suggested that $80 would be easily spent on a same day ski experience without overnight accommodation. To some, the cost of skiing overrides any intrinsic benefits derived from the "fun" or "thrill" of skiing.

6.3.1 Fear

The novice skiers suggest that there is an anticipation of being hurt, of falling or hitting a tree. Most have heard of, or are aware of, stories of individual skiers or groups of skiers being hurt, or actually dying while skiing.

Others suggested their fears have more to do with getting up the mountain in the lifts. Being out of control on skis is also perceived to be a major fear associated with skiing. Most respondents believe accidents are caused by those who continually test their own limits and skills.

Taking lessons with a competent ski instructor is thought to be one of the ways to address and alleviate some of the fear associated with skiing.

6.3.2 Time

Respondents with families, in both Calgary and Red Deer, strongly suggested that the amount of time that is available for skiing is limited. Family, career commitments, and obligations preclude skiing during the week. Weekends are preferable. Local mountains would possibly be visited more frequently just for the day as less planning is required, and are more in line with their plans for the entire busy weekend.

Singles also consider the weekends to be preferable as there are more people around and the social aspect increases. They prefer the whole range of skiing activities.

6.3.3 Logistical Considerations

Respondents perceive a ski trip as requiring a complex planning procedure. There are many components to organize: one has to find and book hotels in an affordable price range, obtain baby sitting services or arrange day care, book lessons (if desired), rent equipment, pack the family, drive 2, 3 or 4 hours, unload, buy lift tickets, etc. To many, arranging these components would be very frustrating and time consuming.

For those with children, it was considered important that quality day care or baby sitting be provided at least during the evening. This would allow respondents to partake in apres ski activities, considered to be an integral part of the skiing experience.

6.4 Appeal of Skiing as Winter Vacation

Respondents from both groups prefer to travel to a warm climate for a winter vacation. Many suggested they are not keen on participating in outdoor activities in winter because it is just too cold. Respondents also suggested they tend to take the mountain for granted and therefore need to be somewhere else, preferably sunny and warm. It was also suggested that long line-ups were a major detraction factor in the skiing experience. One does not want to "waste" vacation time lining up.

6.5 Appeal of Brochures

Respondents were shown a variety of brochures from different resorts and mountains. The brochures were diverse in presentation. To most of the respondents, the brochures suggested "young" "trendy" and "expensive". For many, these first impressions represented substantive barriers. More appealing however, were the brochures or parts of brochures portraying the "other" components associated with a skiing experience. These include pictures of people relaxing in the sun, dining out in a nice restaurant, sitting around a fire, romantic settings and groups of people "having fun". The "romance" appeal was stronger for the single than for those with families. Pictures of the resort villages and the physical setting and surroundings were also considered important.

6.6 Ski Package Concepts

Both family and non-family respondents found great appeal in pre-packaged ski holidays. This perhaps is not surprising as one of the major barriers (more so for families) involved the extensive planning necessary for a skiing experience.

Respondents welcomed those options that outlined all details taken care of, including transportation, accommodation, rentals and lessons. Essentially, respondents would like to walk on a bus and have the rest of the details pre-arranged. There was strong appeal for an all-inclusive price package. However, this does not suggest that they are willing to pay a great deal of money for the experience. What may be needed is a measure of price sensitivity. Lower priced packages may be more appropriate for local mountains. Local mountains are considered good places to start to take lessons or refresh one's skills. Ski packages that include lessons had strong appeal. There was strong appeal for those resorts that also have a variety of amenities and services. The major mountains are expected to provide a greater range of amenities, on a smaller scale but local mountains should also have the basics such as restaurants, retail shopping stores, clubs etc.

Non-skiers indicate strong appeal for "hassle free", all inclusive affordable ski packages that are suitable for families and singles.

7.0 RECOMMENDED MARKETING STRATEGY FRAMEWORK FOR NON-SKIER/BEGINNER SKIER MARKET

7.1 Introduction

This marketing strategy framework provides recommended guidelines concerning how Alberta's ski industry might attract current high potential non-skiers. As envisioned, it does not require significant increases in the resources allocated to ski marketing, but it does call for selective marketing activities targeted at specific non-skier market segments. Priorities for action and specific programs associated with these priorities should be established by the ski industry and its partners. The ski industry association in general, and the individual ski area operators, in particular, have significant roles to play in this regard.

7.2 Strategic Marketing Objectives

If the strategic marketing objectives are achieved, the combined affect of increasing the number of new skiers, skier-visits, and expenditures will generate additional revenues for small and medium sized ski areas in the short run, and large ski resorts in the long run. Additionally, ski industry manufacturers, retailers, employees, as well as government will benefit from this market expansion. The strategy is one that focuses on building market demand in Alberta rather than shifting or redistributing current market share.

7.3 Target Markets

Based upon Marktrend research, two well defined Alberta-based target markets have been identified as the focus of the marketing strategy. They are:

a) the "Young Family"; and
b) the "Social Adventurer".

7.3.1 The Young Family Target Market

The Young Family target market is largely comprised of individuals who are primarily young (18-34 years) and urban. A sizeable proportion of them have previously skied and know others who downhill ski. They consider themselves to be particularly athletic and generally have a positive picture of skiing. Their image of skiing is built around the notions that skiing is:

- fun/exciting;
- an outdoor escape in the mountains;
- a family based sport;
- not difficult to learn;
- not particularly dangerous.

Potential Young Family skiers currently do not ski primarily because they are raising young children and find skiing's costs and distance from home to be significant constraints. An image of the ski industry catering more to a family's needs, as well as all inclusive, low cost beginner or "refresher" ski packages might entice them to commence skiing with their family members.

7.3.2 Social Adventurer Target Market

"Social Adventurers" are primarily younger and unmarried individuals essentially employed in skilled labour occupations, and earning lower then average annual incomes. For the most part they have not skied before. They imagine skiing to be:

- thrilling
- exciting
- at times dangerous and risky
- difficult to learn

Their interest in the sport is primarily linked to its social and skill demonstration dimensions. Positioning skiing as a "fun and exciting time with the gang"; affordable, and hassle free would be definite enticements for the Social Adventurer to take up skiing.

7.4 Communication Objectives

The marketing strategy through its actions is designed to:

* accentuate the positive dimensions of skiing that are available to current high potential non-skiers at accessible local Alberta ski areas;

* diffuse the negative images of skiing that are perceived to be associated with the beginner ski product as it currently exists;

* increase awareness of the diversity and number of accessible and user friendly ski areas in Alberta that are perfectly suited for current non-skier Young Family and Social Adventurer ski markets.

7.5 The Beginner Ski Product

The Alberta ski industry currently does not aggressively market a ski product particularly targeted at the high potential non-skier market. Beginner skiers do not focus their purchase decisions on the physical aspects of skiing, but rather on a mixture of benefits that the activity can provide. It is a particular mix of on and off slope ski facilities and services that the high potential non-skier is looking to purchase. For both the Young Family and Social Adventurer ski markets, that product is essentially "fun" as defined in terms of:

* Sharing the experience with friends and/or family;

* Achieving or improving competence in skiing technique;

* Reliving skiing events (e.g. thrills, mishaps, embarrassments) with companions;

* Feeling the exhilaration of being outside in a scenic mountainous environment;

* Getting away from the stresses of everyday life; and

* Being hassle free.

The product for Young Family individuals is more focused on opportunities for family based recreation and socialization, while the Social Adventurer segment is concerned with benefits such as experiencing risk, speed and being accepted by members of their peer group.

It is crucial that the ski industry provide beginners with ski products which reinforce opportunities for fun experiences and dispel negative ideas of skiing. Tailored ski products suited to each of these market segments should be developed.

7.5.1 Overcoming Skiing's Rough Product Edges

While the existing ski product has some positive dimensions for non-skiers, perceived and real problems associated with the current ski product are significant enough to keep non-skiers off Alberta's hills. These "rough edges" must be tuned before non-skiers will consider adopting skiing. They relate to time, cost, safety, skiing competency, elitism and hassle issues.

7.5.1.1 Overcoming Time Constraints

Alberta's high potential non-skiers are busy people. They claim to have significant commitments linked to a wide range of job, family and other home related duties. From a market development point of view it is important that the ski industry provide a ski product which includes:

* Conveniently scheduled and accessible transportation to and from the ski area;
* On and off-site ticket purchase outlets, preferably with credit card transaction capabilities;
* Lift facilities with high traffic capabilities;
* All-inclusive beginner ski packages which minimize transaction and preparation time;
* Reliable information concerning highway traffic, line-ups and snow conditions;
* On-site "service oriented" personnel available to guide them through the ski experience in a time-efficient manner;
* Fast, clean, high quality food service facilities; and
* Streamlined, hassle-free equipment purchase and rental facilities.

7.5.1.2 Overcoming Cost Constraints

Many high potential non-skiers, particularly Social Adventurers, are convinced that skiing is too expensive. This perception is associated not so much with the cost of the lift ticket, as it is with all of the extra "trappings" that go with the ski experience. It is the "staging and setting" of the event, rather than the actual activity which creates the cost barrier for non-skiers. They perceive the ski experience to be too expensive without knowing exactly how expensive. The ski industry needs to adjust market perceptions by communicating what actual costs are involved; how these costs can be reduced without negatively influencing the experience; and convincing the potential skier that the value they get for their money is worthwhile. Marketing messages to employ in this regard include:

* Skiing's costs on a daily or hourly basis are very competitive with several leisure time alternatives such as an evening at the theatre; dining out; attending a major sports event; going golfing; joining an athletic club;

* The cost of ski equipment acquisition when amortized over its expected lifetime is competitive with other leisure pursuits;

* Ski clothing costs should be assessed based on their durability, and multi-purpose uses;

* Top quality rental facilities and other promotional programs provide the opportunity to ski without making a major capital investment;

* Included in the lift-ticket price are access to well groomed hills and trails; safety facilities and personnel; indoor food, beverage and rest room facilities; targeted ski programs; and hospitality services;

* Skiing is more than just going up and down a hill or along a trail. Skiing is a complete experience including the trip to and from the area, exciting and fun events;

* Skiing provides relatively inexpensive access to some of Alberta's most scenic and natural environments;

* Skiing provides an opportunity for friends and for families to spend uninterrupted quality time together in a healthful environment;

* Skiing manufacturers and retailers can provide beginners with ski equipment and clothing suited to their capabilities and pocket book;

* Skiing has packages designed for beginner skiers which significantly reduce the overall cost of going skiing. These include:
  - Acquiring family or individual season lift passes;
  - Variable lift pass prices for weekday, weekend and daily visits;
  - Ski equipment purchase and buy-back programs;
  - Ski equipment trade-in programs;
  - All inclusive beginners ski package programs;
  - Introductory beginner ski rental and lesson programs.

7.5.1.3 Overcoming the Fear of Injury Constraint

If potential skiers are concerned about personal safety, they need to know more about the many ways in which the ski industry has dramatically reduced the dangers of skiing. New ski promotions targeted at potential skiers should highlight such beginner ski program dimensions as:

* Well trained ski instructors familiar with the latest in ski teaching techniques, who are capable of teaching new skiers to ski under control very quickly;

* Friendly and knowledgable ski patrollers;

* On-site and off-site equipment safety testing and maintenance programs;

* On-going and safety conscious hill grooming programs;

* On-hill safety signage programs indicating appropriate skiing capability requirements; snow conditions; and hazard locations;

* On-site skier safety awareness programs;

* Technologically advanced ski equipment designed to minimize potential ski injuries;

* Factual information about recreational skier injury types and frequencies;

* Skiing opportunities which do not emphasize the "steep and deep" type of skiing;

* State of the art lift equipment and well trained lift attendants capable of getting new skiers on and off the ski lifts in a relatively easy fashion.

7.5.1.4 Overcoming the "Fear of Embarrassment" Constraint

Many potential skiers believe they will be embarrassed if they do not "ski the right way". However, they are unaware of what opportunities to learn exist or what that experience will be like. They need to know that instruction in skiing is available to them in ways that are readily accessible from cost, time, and location perspectives. They need to know that learning to ski programs are not designed to be embarrassing. It should be communicated that they are specifically designed to be:

* Fun-filled and exciting;

* Not embarrassing because everyone finds opportunities to laugh at themselves and others at one time or another;

* Led by well-trained and hospitable ski instructors who help to keep beginners out of awkward situations;

* Not difficult to succeed due to modern energy saving and time efficient teaching techniques;

* Suited to situations with friends/family and others of similar capability;

* Hassle free because they are designed to meet the special needs of beginners;

* Helpful to beginners who wish to learn to ski better and more safely, sooner than would normally be the case;

* Suited to making friends because of similar experiences encountered during the instructional programs;

* Available in packages that remove most of the concerns and potential embarrassments regarding preparation, safety, equipment, and learning decisions.

7.5.1.5 Overcoming Skiing's "Aloof/Elite" Image

Potential skiers are unlikely to venture into the sport of skiing on their own. In many instances, they perceive a significant gap existing between themselves and the lifestyles of their skiing counterparts. They need to be guided into skiing by an experienced and committed person, either a friend or a professional who can help introduce them to a formalized and targeted program designed to make skiing a fun and exciting experience to which they can relate. The challenge for the ski industry is to provide the personal link. The linkage can be through other skiers, ski area staff, retail sales personnel, ski instructors, and other knowledgable people in the ski industry. However, potential skiers are not going to seek out the information or find that personal link on their own. The ski industry has to come to the non-skier to make the connection. It may be through schools, clubs, the work place or even other leisure activity connections. Specific opportunities in this regard include:

* Encouraging retailers in conjunction with ski areas to hold low-key, informational clinics, extolling the friendliness and fun dimensions of skiing, and placing less emphasis on expensive equipment and fashion;

* Encouraging the ski press to place more emphasis on beginner and novice ski stories which focus on the socializing and beneficial dimensions of the activity;

* Encouraging ski area employees through targeted seminars and educational programs to focus on polite, friendly and service-minded activities for beginner skiers.

7.5.1.6 Overcoming Skiing's "Expedition Mentality" Image

The perceived logistical complexities associated with skiing make it a daunting and anxiety filled leisure pursuit for many non-skiers. In combination, these perceptions portray the ski experience as a series of expedition related manoeuvres that aren't worth the hassle of pursuing. It is critical that the ski industry reduce the reality of these perceived impediments wherever possible.

Suggested programs that might help in this regard include:

* Off-Site Hassle Reduction
  - Providing centralized off-site outlets for day, week and vacation ski packages suited to Young Family and Social Adventurer skiers;
  - Assuring that transportation and parking services meet high standards of hospitality and efficiency;
  - Providing timely and reliable information to target markets concerning snow conditions and optimum skiing periods.

* On-Site Hassle Reduction

- Providing clean, well-maintained, attractive and accessible lodges, bathrooms, parking lots, rental shops;
- Pre-selling lift tickets, ski rental packages, ski lessons wherever possible so as to reduce queuing requirements;
- Smoothing traffic flow in lodges, lift lines, parking lots, rental shops, and food and beverage areas;
- Providing hill hosts/ambassadors to greet beginning skiers, offer directions and answer questions;
- Installing high quality and well placed signs and displays to tell beginners where they are and where to go;
- Distributing via "Advance mailing" or on-site brochure, words of advice concerning "the world of skiing for the beginner and how to enjoy it thoroughly--tips on having fun at the ski area".

* On-Slope Hassle Reduction

- Minimize traffic by non-beginners in areas where beginners frequent;
- Optimize scenic viewing opportunities, snow conditions and grooming for beginner ski groups;
- Assign best and most friendly instructors to beginners;
- Provide short, low cost clinics to people who do not want to invest lots of time and money;
- Provide well-marked trails and route guides for beginner skiers at strategic locations on the hill;
- Provide friendly, social and fun atmosphere for learning.

7.6 Packaging

Marktrend's research clearly reveals that packaging the beginner ski experience would go a long way towards enticing skiers to the ski hill. Packages of interest to skiers might include ski lift facilities, transportation, accommodation, food and beverages, lessons and equipment components. Based upon this research it was apparent that the target markets were particularly interested in a combination of components which might include:

* Lower cost ski lessons at local ski areas designed specifically for novice and lapsed skiers;
* Rental package including skis, boots, poles, and lessons;
* Discounts on clothing and related peripheral equipment at local ski shops;
* A committed ski instructor for the total package;
* A comprehensive ski weekend including transportation, accommodation, lift tickets, meals at a major mountain destination;
* On-hill fun events;
* A recognition symbol (e.g. participation badge, ski area button, lesson completion certificate).

The expected effect of this type of ski packaging is to remove many of non-skier fears regarding preparation, safety, equipment costs, trip organization and learning embarrassments. Through such packaging "levels of comfort" rise to a point where the only major decision regarding participation is reduced to one final criteria: price.

Examples of ski experience packaging options for non-skier markets include:

* Packaging hill related items such as ski equipment, ski lessons;

* Packaging base related items such as food and beverages, accommodation, ski equipment rentals;

* Packaging off-site related items such as ski movies, ski clinics, ski equipment and clothing purchases;

* Packaging transportation related items such as car rentals, shuttle services, airline or railroad services;

* Packaging special interest groups such as recreation organizations, religious groups, business organizations, industry and professional associations.

7.7 Programming

Non-skiers, when they look at the current Alberta ski product, see it in terms of "What's in it for them", or what use they can make of it. The actual activity and its associated facilities are usually only a backdrop of secondary importance to their more primary motivations. The benefits they seek from skiing are primarily associated with the ski products ability to offer opportunities for:

* Fun;
* Exhilaration;
* Healthy activity;
* Socialization with friends/family;
* Enjoying the outdoors and nature;
* Improving their skiing competencies;
* Demonstrating their skill.

Ski product programming can help to shape the ski experience in ways to which the non-skier can specifically relate. These programs should focus on activities which clearly show the non-skier "what's in it for them". Examples of beginner ski product enhancement programs include:

* Bring a friend for less program;
* See yourself on skis videos/photo programs;
* Apres-ski social programs;
* Day-care /ski camp programs;
* Beginner obstacle race programs;
* Complementary product/service programs;
* Celebrity association programs; and
* Recognition of achievement programs.

7.8 Pricing

Monetary expense is one of the top-of-mind reasons for not skiing in Alberta. However, it has different dimensions in different market segments. For Young Family non-skiers, discretionary income for skiing exists as long as it is accompanied with good value. Faced with competing leisure opportunities, their reaction to taking up skiing is, not whether they can afford it, but is it really worth it for what they are being asked to pay?

For a sizeable proportion of Social Adventurers, the issue is more bottom line. Due to limited discretionary income, the concern for costs is based on actual capability to pay.

Both groups are concerned not so much with the cost of the lift ticket, as they are with the entire set of costs associated with the skiing experience. Cost expectations seem to be associated with the skiing experience: a trip/expedition to the mountains, rather than an adventure at the local ski area.

Marketing strategies related to the pricing issues should focus on:

* Creating an awareness amongst non-skiers of the range of facilities, services and benefits received for their discretionary dollars;

* Creating an awareness amongst non-skiers concerning means of reducing the cost of the ski experience without eliminating its ability to provide satisfaction;

* Providing price structures for ski packages which reflect the beginners' needs and pocket book.

In combination these strategies involve designing a beginner ski product which is in line with (or better still, is lower than) the price that they are able to pay. It also involves conveying to non-skiers a sense that they will receive good value for their money.

7.9 Positioning

Alberta's beginner skier product(s) must be clearly positioned in the minds of non-skiers. A two-level positioning is suggested. The first level "introductory/feeder" position should be associated with existing day-use and weekend ski areas offering a beginner ski product. It is:

> *"Alberta ski areas: for a fun, social and value-packed introduction to skiing."*

The second level "finishing" statement should be associated with existing destination/resort ski centres providing a beginner ski product. The recommended statement is:

> *"Alberta ski areas: for a fun, rewarding and scenic ski experience with a little bit more for new skiers."*

Both positioning statements have been designed to be adaptable to the specific needs and aspirations of Young Family and Social Adventurer beginner skiers.

7.10 Place

Conventional channels of ski product distribution will in most likelihood not bring non-skiers to the slopes. Non-skiers tend not to frequent ski shows, ski shops, ski facilities, or ski events. It is imperative that the ski industry complement traditional approaches with a strong focus on using the local travel trade to get the message out. Travel trade organizations provide an extra edge in terms of:

* Knowing non-skier markets;

* Assembling packages designed for specific travel market groups;

* Arranged additional services and products complementary to the beginners ski product.

To link the beginner ski product with ancillary yet necessary travel components in a smoothly functioning market system, it is recommended that Alberta's ski industry work directly with local tour operators, travel clubs, government marketing departments, regional tourism organizations, transportation companies and incentive travel companies to distribute the beginner ski product.

7.11 Promotion

To heighten non-skier awareness of beginner-specific ski products and stimulate purchase decisions, the ski industry should mount a non-skier promotional campaign. It should focus on a promotional mix comprised of advertising, personal selling, sales promotion, publicity and public relations activities.

7.11.1 Advertising

All advertising undertaken by the ski industry should be consistent and straight forward in context. Non-skiers should be exposed to advertising which focuses on one or more of the following objectives:

* Promoting the Features of the Beginner Ski Product - stressing its ease of participation; speed; safety and control features; qualified and friendly ski instructors; accessibility at the local level, excellent snow conditions, recreational orientation.

* Building on the Non-Skier Attitudes, Interests, Wants - such as opportunities for socializing with family/friends; escape from everyday pressures; health/fitness; challenge and safety; romance; fun and exhilaration.

* Promoting the Beginner Ski Products' Distinctive and Exciting Personality - through images and associated messages related to fresh, clean outdoor experiences; scenic natural mountain settings; powder soft snow; family/friend oriented groupings; accessible and value-packed experiences.

* Building on the Beginner Ski Product's Unique Marketing Image - which stresses: people of varying age and athletic ability learning to ski; safe and controlled skiing behaviour; wide ranges of styles of clothing; skiers smiling and having fun; skiers of both genders participating; reasonable costs.

7.11.2 Personal Selling

Personal selling of the beginner ski product should be confined to groups, corporations, associations, clubs, and travel trade that may be interested in incorporating skiing into their activities. Many existing non-skiers have friends/acquaintances who have skied before or who are active skiers. Furthermore, most non-skiers like the socializing dimension of skiing. Consequently, it would be worthwhile to contact current skiers to determine those local organizations and groups with whom they currently associate, that might represent candidates for personal selling. Local sources which typically generate skier traffic include:

* Local firms or organizations interested in co-sponsoring or supporting special events and programs for their membership;

* Social and recreation organizations conducting non-competitive activities;

* Local travel associations and government tourism marketing offices;

* Local and regional directories and lists of special interest groups, associations and companies (e.g. high school recreation clubs; Kiwanis and Rotary Clubs; bowling leagues, etc.)

7.11.3 Sales Promotion

Given the unique character of the beginner ski product and its current level of unfamiliarity with most travel/tourism influencers, the ski industry should undertake a sales promotion campaign highlighting this new ski product. Targeted at high potential intermediary groups (e.g. high school club executives; chamber of commerce officials, sports club administrators, etc.) the sales promotions should be designed to stimulate interest in the beginner ski product and reinforce the image of skiing as a fun, exhilarating and value-packed activity suited to people of all ages. Promotional sales activities might include:

* Brochures highlighting beginner ski package components with beginners having fun with friendly ski instructors;

* Discount or free-trial coupons for beginner skiers including lesson, lift ticket, ski-area orientation, and ski rental packages;

* Contests providing season ski passes to individuals drawing specified quotas of new skiers to the ski area;

* Special offers (e.g. temporary price reductions on ski clothing and/or equipment with the purchase of a beginner ski package);

* Gifts, novelties and premiums (e.g. ski area badges, key chains, lift discount coupons, two for the price of one ski lessons) for bringing new skiers to the ski area;

* Exhibits and displays (e.g. videos of beginners having fun with new friends in friendly scenic ski areas) for use in public locations/events;

* Support services (e.g. information booths at ski equipment and recreation sports shows, ski lesson purchase and lift ticket booths at local accommodation facilities);

* Signs illustrating beginner ski programs in schools, public buildings;

* Special events demonstrating the safety and ease of learning skiing for use at club sponsored meetings;

* Training programs and seminars at the ski hill or at recreation centres for interested local groups.

7.11.4 Public Relations

By becoming involved in the affairs of the community, the ski industry can develop and improve its image as a business concerned about people of all types. Individual ski operators can enhance the image of their facility as a place for beginner skiers by:

* Maintaining a proper and friendly attitude with all potential user groups--even those marginally interested in the ski area;

* Supporting local advertising media with beginner ski product supplements;

* Adopting a pleasant and inviting telephone manner;

* Joining and supporting service clubs, community groups, sports organizations, regional and provincial/territorial/trade organizations;

* Purchasing supplies and services locally.

7.11.5 Publicity

Publicity serves to keep the ski industry in the public eye without having to pay for advertising. The ski industry should carefully cultivate publicity opportunities associated with its beginner ski product. Publicity strategies the ski industry in Alberta should seek to develop and implement include:

* Staging news events involving genuine interest stories concerning beginner skiers (e.g. the oldest new skier in the province; a well-known celebrity learning to ski at a local ski area; a family of triplets participating in a ski equipment purchasing exercise);

* Issue press releases, announcing either spot news or scheduled news (eg.. the appointment of a new beginner oriented ski instructor chief; the commencement of a modern and effective learn to ski technique; the opening of a kids day camp program, etc.);

* Offer ski facilities for charitable events especially catering to non-traditional potential skier groups;

* Volunteer to attend meetings as a guest speaker addressing beginner skier issues such as "money-saving techniques for making skiing affordable"; "skiing's true accident rates"; "what beginner skiers say about skiing";

* Participate in special events--if possible using the event to distribute beginner ski package brochures and/or other promotional materials (e.g. fall fairs and parades; school and college orientation programs; career days; national ski week events);

* Invite travel writers to participate in beginner ski programs.

7.12 Performance

So much of the breaking down of the barriers to skiing evolves around treating new skiers in friendly and hospitable ways. Making them feel comfortable in a new and challenging pursuit is largely a function of customer service marketing. The ski industry should take concerted steps to ensure that staff take every effort to encourage new skiers to enjoy themselves more, so that they will return more often, and recommend skiing to their friends. Specific marketing activities to encourage customer service for new skiers include:

* Implementing performance report cards to assess consumer satisfaction levels with staff and the ski product;

* Developing employee customer service training programs to acquaint staff with the peculiar interests and requirements of beginner skiers;

* Developing employee hiring practices targeted at attracting and retaining hospitable service oriented employees;

* Building customer service attitudes into the mission statement and subsequent activities of all ski area staff and management.

APPENDIX A

NON-SKIER STUDY LITERATURE REVIEW

NON-SKIER STUDY LITERATURE REVIEW

INTRODUCTION

Although Marktrend recognizes that there are inherent differences in the American and the Canadian ski markets, there exist enough similarities to compare and to correlate various features of the American market to the Canadian market. Where possible, specific references to the Alberta ski market will be made.

A number of articles appearing in periodicals as well as individual reports were available to Marktrend through the Calgary Public Library, the University of Calgary Library and from the files of the client. These articles and reports provided information about current demand, market segments, barriers and constraints, motivations and needs, stimuli and future demand potential in regard to the non-skier population.

Current Demand

McKinsey and Company's Findings:

The analysis of current demand has been undertaken by a number of different studies--with varying outcomes. According to McKinsey and Company (Building Ski Industry Demand, January 1989), in recent years, the ski industry has experienced a flattening out of real growth and real revenue from the skier market. They believe the number of skier visits per annum, in the States, has levelled off in recent years. McKinsey states that this flat level of demand combined with rising fixed costs for the industry and small real increases in average revenues per skier visit help explain why "average ski area profitability" has decreased.

Kottke's View:

However, another article in the January 1990 issue of Ski Area Management, written by Dr. Marvin Kottke, research economist, takes a different view. Kottke is of the opinion that "watching total industry growth in the 1980's may have been misleading," and that "looking at two sectors of the ski industry is more accurate for the 1990's." Kottke says that from 1979 to 1988, skier visits increased in the Northeast and the Southeast by 42% and by 83%, respectively. He also states that the Rocky Mountain region had slow growth at 10%, that the Pacific West's skier visits were flat--due primarily to several poor snowfall years, and that the Midwest was where a bonafide flat market due low demand may have occurred (although, even there, poor snowfall was a contributing factor).

He divides ski areas into two sectors, sector one generally comprises larger ski areas that are members of NSAA, and sector two generally comprises smaller, less commercial areas that are not members of NSAA. Kottke feels that sector one is representative of a growth industry because it "invests heavily in capital resources and plows much of its annual profits back into the business." He points to the fact that because skier visits also increased by a slightly higher percentage than lift capacity growth, sector one is experiencing growth, and its market is not flat. He also points out that few ski areas have vanished from the industry, but that "most have been financially reorganized or bought out by other investors. As a consequence, firm growth continues."

Unfortunately, the picture he paints for sector two ski areas is not so rosy. He states that the smaller sized ski areas have lost large percentages of their ski lessons, thus they are losing their role in the industry. Very small ski areas also face "limited capital funds, high liability insurance costs and lack of consistently good snowfall." Sector two, he feels, is not experiencing flat market growth, but decreasing market growth.

Goeldner's Analysis:

Yet another analysis was conducted by C. R. Goeldner, Associate Dean, College of Business, University of Colorado at Boulder. This analysis appears in the March 1989 issue of Ski Area Magazine; this article provides an economic analysis of the 1987-1988 ski season.

Goeldner states that "good or improved performance was recorded except in the Rockies where losses were recorded." Goeldner notes that after two years of seeing critical indicators turn down, 1987-1988 will be remembered as the season when "the indicators turned in the right direction."

Goeldner writes that "the best operating profit on gross fixed assets was recorded by the Midwest with 12.9%. The East and Ontario followed with 12.5%. Both the California/Nevada and the **Western Canada** regions moved back into the profit column after suffering losses" in the previous season.

In terms of revenue per skier visit, the California/Nevada region is stated to have "led in revenue per skier visit" with $25.21, "followed by the Central Rockies with $21.75, New England with $21.25, East and Ontario with $20.94, **Western Canada** with $18.16, Northern Rockies with $17.18, Midwest with $17.00 and Pacific Northwest with $15.01."

Goeldner provides some key factors by geographic regions; for **Western Canada** (in 000's):

Sample Size		20
Gross Fixed Assets		$8,012
Total Average Revenue	$2,982	
Less: Direct Expenses	$ 844	
Gross Margin		$2,138
Less: General Expenses		$ 982
Depreciation		$ 391
Operating Profit		$ 765
Less: Interest		$ 348
Profit Before Tax		$ 417
Critical Ratios:		
Health (Debt/Cash Flow)		7.3X
Profitability:		
Operating Profit/ Gross Fixed Assets		9.6%
Before Tax Profit on Equity		32.9%
Performance:		
Average Utilization		32.2%
Day/Nights Operation		140
Policy and Planning:		
Capital/Capacity Ratio	$2,444	
Operating Cost/Capacity	$ 4.01	
Total Revenue/Skier Visit		$18.16
Skier Visits (000)		147

Although results reported yearly by Statistics Canada show the level of Canadian households with downhill ski equipment to have increased from 1984 to 1987, there is indication that this period of growth is beginning to level off.

PROVINCE	HOUSEHOLDS WITH SKIS			GAPS		% INCREASE IN SKI OWNERS	
	1984 (%)	1987 (%)	1989 (%)	(% points) 1984/87	1987/89	1984/87	1987/89
Canada	16.6	18.6	20.0	+2.0	+1.4	12	08
NFLD	3.8	4.2	6.0	+0.4	+1.8	11	43
PEI	00.0	00.0	00.0	---	---	---	---
NS	7.5	8.9	12.9	+1.4	+4.0	19	45
NB	7.7	10.6	12.0	+2.9	+1.4	38	13
PQ	20.5	22.7	22.6	+2.2	-0.1	11	00
ON	14.2	15.8	18.0	+1.6	+2.2	11	14
MB	7.4	9.6	8.6	+2.2	-1.0	30	-10
SK	8.7	10.8	12.3	+2.1	+1.5	24	14
AB	24.3	27.2	27.6	+2.9	+0.4	12	01
BC	22.0	23.9	26.3	+1.9	+2.4	09	10

Alberta has the highest percentage of Canadian households that own Alpine ski equipment; it is followed by British Columbia and Quebec. Of these three provinces, Quebec had a percentage decrease in alpine ski-owning households, Alberta had decreased growth in the percentage of alpine ski-owning households, and while British Columbia has had a percentage increase, it is a very minor increase.

Market Segments

In the 1983/1984 ski season, Manecon Partnership reported that the participation rate of skiers in the Alberta population was 14.2% (Alberta Downhill Ski Market Analysis, 1984).

Mckinsey and Company ("Building Ski Industry Demand," Ski Area Management, March 1989) describe the current ski market as being broken down into the following segments:

* potential (never skied, but have likely demographics and affinities)
* new (skied for the first time this year)
* intermittent (consider self a skier, though don't ski every year)
* light (skied 1 - 5 times last year)
* moderate (skied 6 - 15 times, typically including one vacation)
* heavy (more than 15 times)
* drop-out (consider self a former skier).

Potential, new, intermittent and light skiers appear to hold the most promise for becoming regular users of ski areas. Potential skiers need to be motivated and stimulated into becoming new skiers; barriers must be overcome. Intermittent and light skiers need to be encouraged to ski on a more regular basis.

A synopsis of the 1989 National Ski Opinion Survey was presented in "Ski Area Management," July 1989. This survey suggests one group that has potential to become new skiers--those who are over the age of 36. Five thousand, nine hundred and eighty-five interviews were collected from 13 ski areas in the United States. Of the skiers over 55 years who were interviewed, "49% learned to ski after the age of 36, and of the 36-

Barriers and Constraints

There is a lack of demand from heavy users and from drop out skiers who have no intention of returning to the slopes. Heavy users probably have all the equipment they want and their use of ski areas is not likely to increase.

The following barriers and constraints were recognized in the report Ski Tracks to the Future, by Peter W. Williams and Stephen Hayden, 1986:

Barriers:

- 323 of 1,654 or 20% said taking ski lessons is an embarrassing experience
- need of information was expressed for:
  - -benefits of skiing
  - -how to ski
  - -dangers of skiing
- 50% (830 out of 1,654) agreed, somewhat or strongly, that they "don't know enough about skiing"
- 49% (803 of 1,654) somewhat or strongly agreed that they were "concerned about getting hurt while skiing"

Constraints:

- non-skiers are less convinced than are beginner skiers that the preparations necessary to go skiing are worth the effort
- 61% (1,020 out of 1,654) felt professional instruction is necessary for becoming a competent skier
- 69% (1,140 out of 1,654) agreed somewhat or strongly that "skiing is too expensive"
- 867 (52%) said lack of time is inhibiting--they have too many work-related commitments (these were all urban respondents)

And from the 1988 General Recreation Survey, Alberta Parks and Recreation, September 1988:

Competing winter sports--Participating households (%):

* ice skating	45.5
* downhill skiing	33.8
* tobogganing/sledding	27.6
* ice hockey	22.4
* curling	21.3
* cross country skiing	20.8
* Snowmobiling	13.5
* ringette	1.6

Downhill skiing faces competition from other winter time activities--many of which are viewed as having less constraints versus trying skiing for the first time, or making arrangements for a ski trip or ski visit.

Motivations and Needs

Jim Spring, President of Sports Research Inc., has written an article ("survey Suggests Undeveloped Ski Vacation Potential") that appears in the July 1989 issue of Ski Area Management. In his article he discusses what some of the results from the 1989 National Ski Opinion Survey suggest--that people ski because they want to have fun.

This motivator (or "need") may seem an obvious fact, but Spring suggests that it is a fact that has been

overlooked by the industry when it attempts to promote itself. An example is promotion of midweek skiing. Spring states that "...it appears that the reasons we have been giving for turning them on to skiing midweek may be the very things that are turning them off. They stay home because they are not so sure that those negatives we tell them they can avoid by skiing midweek aren't a part of what makes a ski vacation or experience fun..." He also says that "skiers need to be assured that the restaurants, clubs, bars and shops will be open and that there will be enough people around. They don't necessarily believe snow conditions will be better or that all the trails will be open if there is not enough demand. But, most importantly, they seem to be saying 'don't bore me with value, show me it's fun.'"

Spring backs up his claims with statistics from the 1989 National Ski Opinion Survey.

In response to being asked about the important factors which contributed to the enjoyment of skiing, skiers mentioned the following factors:

* being at an attractive resort (79.1%)
* speed (77.9%)
* apres-ski (69%)
* sitting around a fire after skiing (66.6%)

Spring believes that people will make time for "a quality experience which gets them away from the rat race." Skiing is such an experience. Skiers were asked how important a group of factors were to their enjoyment of skiing, the highest rankings were given to:

* the beauty or the mountains and being close to nature (95.7% said it contributed a lot/was important)
* feeling of freedom (95.4%)
* sharing the experience with family and friends (96.1)
* being in the fresh air (98.4%)
* improving style and ability (96.5%)

Bradford B. Moore ("Has Marketing Myopia Hit the Ski Industry?" Ski Area Management, May 1989) shares Jim Spring's views. Moore advises focusing on basic human needs that skiing can meet, rather than on skiing itself. He feels that potential, new, intermittent and light skiers should have skiing offered to them as an activity that provides "a chance to relieve pressure and stress, to escape loneliness and to commune with nature." He goes on to state, "Too often, we in the industry extol skiing undefined so only dedicated skiers understand why we're so excited."

Stimuli

McKinsey and Company said their focus group results suggest that "people who have never skied do not fully understand or appreciate what active skiers see in the sport."

Paul Biklen, retired former vice president with Olgivy and Mather, analyzed and critiqued a number of ski area advertisements (Ski Area Management, November 1989). This is what he had to say about some of them in general: "...[they] fail through laziness to show the consumer any benefit from the product. Some establish a sound selling idea and then fail to execute it clearly. Others assume an area is well known. Effective advertising serves the consumer when it serves up useful information."

An example that he uses of an advertisement that has fallen into the above mentioned description is the "Ski A Dream" advertisement put out by Canadian Pacific Hotels and Resorts. Biklen calls this headline "fatuous," "meaningless," "lazy" and "empty." He calls it an opportunity missed because "presumably the four resorts in the Canadian Rockies offer something special, something unique." However, "we know almost

nothing more about them after reading every word [of the copy]."

Biklen suggests that ski area operators note the results in the McKinsey Report that disclose "...why skiers ski and what they like about skiing." Armed with this information, they can then "...relate them to [their] own selling strengths."

Irvin Naylor, President of Ski America Inc., discusses the success of his three ski areas Ski Roundtop, Ski Liberty and Ski Windham in "Small Area Success Story (excerpts from his speech)," Ski Area Management, January 1989.

Each have some features that could be viewed as stimuli for increasing the number of skier visits from new, intermittent and light skiers:

- host/hostess program
- first-time-skiers-ski-free orientation lessons
- under five and over 70 ski free
- 5,000 sets of Look/Nordica Integral System rentals and rentals of performance skis
- absolutely clean bathrooms
- required attendance at safety programs for young adult groups
- accurate faxed snow reports
- special ticket endorsements for advanced slopes
- late, late night programs

Bill Stenger, President and C.E.O. of Jay Peak Ski Area, Chairman of the NSAA Marketing Committee and head of the Marketing Task Force, provides a condominium market geared to young families because he "can't overlook the fact people like to ski, and learn to ski in so many cases, because their friends and family ski.. and we want to get people reaching out to their friends and relatives to get them into--or back into--skiing."

Future Demand Potential

There are some very viable sources for providing future demand. Potential skiers, that is, those with likely demographics and affinities, and from those over the age of 36, including baby boomers, are some of these sources.

A market profile of skiers was defined by Judith Waldron, Senior Editor, American Demographics Magazine, in the article "Where Will New Customers Come From?" Ski Area Management, March 1989. Waldron took her information from data collected in 1988 by Simmons Market Research Bureau in New York City. Current skier demographics are:

- those with a higher than average level of education
- those with a higher than average level of income
- those in a lower age bracket than the average population
- mostly male
- mostly single
- living mainly in the Northeast, then in the West, in the Midwest and in the South
- an above average share of participants in individual and team sports

Many golfers, tennis players, boaters, water skiers, backpackers, weight trainers and racquetball players share a large proportion of the demographics that make up skiers. For this reason, these sport participants hold a large number of potential skiers.

Many of these potential skiers could be reached by advertising directed to them, or better yet, through active skiers that share the same sports interest as themselves. Usually a high percentage of skiers participate in golf (16.1%), tennis (11.8%), hiking (10.7%), power boating (10.5%), weight training (12.2%), racquetball (14.6) and water skiing (18.4%); the source for these figures was Simmons Market Research Bureau, New York City, 1988.

Another source of potential skiers comes from those in the over 45 age group. The older set can be encouraged to try skiing through ski clubs. Skiing provides a friendly, social atmosphere which has been shown to be very important to skiers. Moreover, the 1989 National Ski Opinion Survey ("Survey Suggests Undeveloped Ski Vacation Potential," Ski Area Management, July 1989) found that a "disproportionate percentage of skiers belonging to clubs" were over 55 (15.1%).

"A disproportionate percentage of...the under-25 group (17.9%)" was also found to exist showing that clubs could be useful for recruiting sports enthusiasts of other disciplines for skiing.

This survey also found that learning to ski is increasing in importance as a new vacation option for Americans. They found that "almost 10% of all skiers interviewed...were first-time skiers, and of those, 54.8% were on vacation." These results, when compared to 1987 figures showed a 15% increase "of people who decided to learn to ski while on a winter vacation." Thus winter vacations can be used as a tool to encourage people to learn to ski and turn potential skiers into new skiers.

Locally, unfortunately, as stated in the Calgary Sun, March 29, 1990, "both Banff areas appear to be experiencing a significant drop in destination business. The Canada West Ski Areas Association amasses such statistics but early reports suggest destination business is down about 25%."

Conclusion

Although it appears that the ski market has shown some flat or some non growth in past years, it does now seem to be showing some encouraging signs of growth, or at the very least, potential growth. There are many sources of new skiers available for the industry to nurture. New, intermittent and light skiers could also be persuaded to increase their skier visits. If the ski industry is willing to determine what new and present skiers' expectations, fears and hopes are, and if they are willing to communicate to these same skiers how their hopes, expectations and fears will be fulfilled and relieved, then the industry should show much promise for growth.

APPENDIX B

ANOMALY IN THE CALGARY RESULTS

ANOMALY IN THE CALGARY RESULTS

An anomaly was noted in the results from Calgary respondents. Although Calgary is the closest urban centre to the concentration of major ski areas in the Banff area, there is a love/hate relationship with skiing among the city's residents.

The quantitative results show the following:

- Calgary has the highest level of "lapsed" skiers than any other Alberta area.
- These lapsed skiers had skied more frequently than lapsed skiers from other areas; and,
- They are the least likely to ski in the foreseeable future.

Hence they had tried skiing and rejected it. Their familiarity and exposure to the sport whether in Banff or during the Olympics has convinced them that skiing is expensive and not as pleasurable as they would want.

Calgarians made the strongest negative comments regarding long line-ups, need for high-fashion clothing, crowds, cost of lift tickets and other components of the ski experience (hotels, meals, etc)

Considering the case with which the city residents can access the major areas, their attitudes towards participation are difficult to reconcile. Familiarity has bred contempt.

APPENDIX C

QUANTITATIVE COPY OF STUDY QUESTIONNAIRE

March 7, 1990

DRAFT FIVE - **Non-Skier Potential Questionnaire**

Good afternoon\evening, my name is _____ calling from Marktrend Marketing Research. Today/tonight we are conducting a survey on leisure activities on behalf of Alberta Tourism and the Alberta Ski Industry. May I please speak with the male or female of your household who is 18 years of age or older and has the next birthday?

Yes 1
No ..... 2]
ARRANGE A CALLBACK IF POSSIBLE

RE-INTRODUCE, IF NECESSARY

INTERVIEWER: RECORD GENDER

Male ..... 1 **WATCH**
Female ..... 2 **QUOTAS**

1a. When you think of downhill skiing, what first comes to mind?

_____

_____

_____

b. Have you ever been downhill skiing?

Yes 1
No ..... 2]
Don't know ..... 3] **GO TO Q.4**
Refused ..... 4]

c. Have you been downhill skiing this season, last season, or the season before?

Yes ..... 1 **TERMINATE**
No 2

d. How many times in <u>total</u> have you ever downhill skied?

Once 1
Twice 2
Three or more times 3
Don't know 4

2. For what major reason have you not skied since then? **(PROBE)** Any other reasons? **(DO NOT READ LIST)**

Other (specify) 1
Don't know 2
Nothing in particular 3
Too expensive 4
Bad initial experience with friends 5
Bad initial experience with ski instructor 6
Don't have the time 7
No longer physically able (injury, doctors' orders) 8
Too far to travel 9

3a. How many years ago was the last time you went downhill skiing?

RECORD EXACT RESPONSE _____ YEARS
AND CODE BELOW

More than 20 years ago 1
Between 10 and 20 years ago 2
Between 5 and less than 10 years ago .. 3
Between 2 and less than 5 years ago ... 4

IF Q.1d IS CODES 3 OR 4, ASK, OTHERWISE GO TO Q.5.

b. On average, how many days a season did you go downhill skiing?

Number of days_____
Don't know 999

4. Why have you never downhill skied? (PROBE)
(DO NOT READ LIST)

Other (specify) 1
Don't know 2
Nothing in particular 3
Too expensive 4
Bad initial experience with friends 5
Bad initial experience with ski instructor .. 6
Don't have the time 7
No longer physically able (injury, doctors' orders) 8
Too far to travel 9

5. Please tell me which recreational and sports activities you have participated in the past two years? (PROBE) Any others? (DO NOT READ LIST)

Other (specify) _____ 1
Don't know 2
None 3
Bicycling 4
Boating or sailing 5
Camping 6
Cross country skiing 7
Fishing 8
Golf 9
Hiking 10
Jogging or running 11
Skating 12
Softball or baseball 13
Swimming 14
Tennis 15

6. On a scale from 1 to 6, where 1 means "not at all likely" and 6 means "very likely", how likely are you to try downhill skiing in the next.....(READ LIST)

	Not at all likely					Very likely	DK	Refused
Year	1	2	3	4	5	6	7	8
Two years	1	2	3	4	5	6	7	8
Three to five years	1	2	3	4	5	6	7	8

7. Do any of the people in the following groups downhill ski? (READ LIST)

	Yes	No	DK/Ref
Your girlfriend, boyfriend or spouse	1	2	3
Any other members of your immediate family	1	2	3
Any personal friends	1	2	3
Any co-workers	1	2	3

8. Would you say you are ....(READ LIST)

	Very athletic	1
	Quite athletic	2
	Somewhat athletic	3
	Not too athletic	4
	Not at all athletic	5
DO NOT READ	Don't know	6
	Refused	7

Now I am going to read a series of statements that have been made about downhill skiing. Would you please tell me how much you agree or disagree with each of these statements using a one to six scale, where 1 means you strongly disagree with the statement up through 2, 3, 4 and 5, to 6 which means you strongly agree with this statement.

		Strongly Disagree					Strongly Agree	DK	Ref
9.	I think of skiing as a recreational activity rather than a competitive sport.	1	2	3	4	5	6	7	8
10.	Improvements in warm ski clothing and better ski equipment have made skiing easier and more enjoyable.	1	2	3	4	5	6	7	8
11.	I sometimes feel a little left out because I don't ski.	1	2	3	4	5	6	7	8
12.	There is not enough information concerning how to ski.	1	2	3	4	5	6	7	8
13.	For someone who knows how to ski it is not a dangerous sport.	1	2	3	4	5	6	7	8
14.	I would be afraid of being out of control if I tried skiing.	1	2	3	4	5	6	7	8
15.	The chances of receiving a serious injury skiing now are much less than they were five years ago	1	2	3	4	5	6	7	8
16.	I prefer team sports rather than individual activities such as skiing.	1	2	3	4	5	6	7	8

		Strongly Disagree					Strongly Agree	DK	Ref
17.	Beginner skiers look so silly that I would be embarrassed to try with all my friends around.	1	2	3	4	5	6	7	8
18.	Many people only take up skiing because its trendy and glamorous.	1	2	3	4	5	6	7	8
19.	Skiing can be a good family sport.	1	2	3	4	5	6	7	8
20.	Ski lifts are scary.	1	2	3	4	5	6	7	8
21.	I think it's harder to learn downhill skiing than other sports such as cross country skiing or tennis.	1	2	3	4	5	6	7	8
22.	Skiers like to show-off to their friends.	1	2	3	4	5	6	7	8
23.	Skiing is equally attractive to men and women.	1	2	3	4	5	6	7	8
24.	Skiers take more risks in general than non-skiers.	1	2	3	4	5	6	7	8
25.	To many skiers its more important to party than to actually [illegible]	1	2	3	4	5	6	7	8
26.	Skiing seems like a very fast sport.	1	2	3	4	5	6	7	8
27.	For me skiing would take up too much time.	1	2	3	4	5	6	7	8
28.	I am not exactly sure how to go about learning to ski.	1	2	3	4	5	6	7	8
29.	Skiing is a younger person's sport.	1	2	3	4	5	6	7	8
30.	Ski hills are very steep.	1	2	3	4	5	6	7	8
31.	Learning to ski must be a very rewarding experience.	1	2	3	4	5	6	7	8
32.	The cost of the equipment is too expensive.	1	2	3	4	5	6	7	8
33.	For me, skiing's strongest attraction would be to get away, out of town, and in the mountains.	1	2	3	4	5	6	7	8
34.	Skiing is physically demanding.	1	2	3	4	5	6	7	8

		Strongly Disagree					Strongly Agree	DK	Ref
35.	It is important to have easy, inexpensive transportation to the ski area	1	2	3	4	5	6	7	8
36.	A low cost beginners ski lift ticket/transportation fare/ ski rental package would entice me to ski.	1	2	3	4	5	6	7	8

37. What would you personally say is the main attraction of skiing that causes people to continue to participate in the sport?

_____

_____

_____

38. If you decided to start skiing again or go for the first time, which would you be most likely to do? **(READ LIST)**

Try it yourself 1
Have a friend show you how 2
or
Take a series of lessons in a ski area from an instructor. 3
DO NOT READ
Don't know 4

39. Would you be more likely to go to a major resort, or a local ski area?

Major Resort 1
Local Ski Area 2
Don't know 3

40. When thinking about ski areas in Alberta, which one first comes to mind? **(DO NOT READ LIST) (RECORD IN ORDER OF REPLIES)**

Other (specify) 1
Don't know 2
None 3
Banff 4
Canada Olympic Park 5
Nakiska 6
Jasper 7
Lake Louise 8
Norquay 9
Sunshine 10

41. On average, what do you think is the cost of a one day Alberta ski area lift ticket?
(IF RESPONSE IS A RANGE, TAKE MIDPOINT E.G. $20-$30 : ENTER $25)

$_____
Depends on resort 998
Don't know 999

42. If you were to take up skiing, how many days per season would you expect to go?

days _____
Don't know 999

43. Have you recently seen or heard any advertising, or media reporting associated with skiing, or that features skiers as the main characters?

Yes 1
No ..... 2] GO TO Q.45
Don't know ..... 3]

44. Please tell me all the details you recall. (PROBE) Anything else?

_____

_____

_____

45. Including yourself, how many people live in your household?

1 2 3 4 5 6 7 8+ 9 Refused
GO TO Q.47

46a. How many children under the age of eighteen live in your household?

1 2 3 4 5 6 7 8+ 9 Refused
GO TO Q.47

IF ONLY ONE CHILD IN Q.46a, ASK: How old is this child?

b. IF MORE THAN 1 CHILD IN Q 46a, ASK:
How old is the oldest child?

_____years

RECORD INFANTS UP TO 6 MONTHS AS 0

47. I'm going to read off several age categories. Please stop me when I mention the range into which your age falls? READ.

18 - 24 1
25 - 34 2
35 - 44 3
45 - 54 4
55 - 64 5
65 and over 6
DO NOT READ
Refused 7

48. Which of the following best describes your educational background? READ.

	Some high school	1
	Graduated high school	2
	Vocational/technical/college	3
	Some university	4
or	Graduated university	5
DO NOT READ		
	Refused	6

49. What is your occupation? DO NOT READ.

Professional	1
Business executive/management	2
Sales	3
Clerical	4
Technical	5
Skilled labour	6
Unskilled labour	7
Farmer/Fisherman	8
Police/Military	9
Homemaker	10
Unemployed	11
Retired	12
Student	13
Other (specify_ _____	14
Refused	15

50. What is your marital status? DO NOT READ.

Single	1]	GO TO Q.52
Married/common law	2	
Divorced/separated/widowed	3]	GO TO Q.52
Refused	4]	

51. What is your spouse's occupation? (DO NOT READ)

Professional	1
Business executive/management	2
Sales	3
Clerical	4
Technical	5
Skilled labour	6
Unskilled labour	7
Farmer/Fisherman	8
Police/Military	9
Homemaker	10
Unemployed	11
Retired	12
Student	13
Other (specify) _____	14
Refused	15

52. **INTERVIEWER RECORD AREA:**

Athabasca 1
Calgary
- Calgary CMA 2
- Drumheller/East 3
Edmonton
- Edmonton CMA 4
- to Lloydminister 5
Lethbridge 6
Medicine Hat 7
Peace River 8
Red Deer/Wainwright 9
The Parks 10

53. What are *the first three digits of your postal code?*

___ ___ ___

54. Finally, what was your total household income, before taxes, in 1989? Was it.....(READ LIST)

Less than $15,000 1
$15,000 to less than $25,000 2
$25,000 to less than $35,000 3
$35,000 to less than $45,000 4
$45,000 to less than $55,000 5
$55,000 to less than $65,000 6
$65,000 to less than $75,000 7
$75,000 or to less than $100,000 8
$100,000 or more 9

DO NOT READ
Don't know 10
Refused 11